# KAZAKHSTAN B2C E-COMMERCE MARKET 2019

## GENERAL INFORMATION

### PRODUCT DETAILS

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### QUESTIONS ANSWERED IN THIS REPORT

- What are the main drivers of B2C E-Commerce growth in Kazakhstan?
- What are the key online retail trends in Kazakhstan?
- How large are Kazakhstan's B2C E-Commerce sales predicted to be by 2021?
- Which product categories are most purchased by online shoppers in Kazakhstan?
- Who are the leading B2C E-Commerce players in the country?

### SECONDARY MARKET RESEARCH

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KAZAKHSTAN B2C E-COMMERCE MARKET EXPERIENCES INCREASED INTEREST FROM CONSUMERS AND THE GOVERNMENT

Kazakhstan is the largest and the most advanced B2C E-Commerce market in the emerging region of Central Asia and Caucasus, with a double-digit sales growth rate, as revealed in the report by yStats.com. Still, B2C E-Commerce in 2018 accounted for less than 2.0% of total retail sales in the country. However, according to another source, online retail sales have reached less than 3.0% in the same year. Among the growth drivers are the increasing Internet penetration, reaching over three-quarters of the population in 2017, and a growing interest in online shopping, especially among the young population.

One of the challenges to the B2C E-Commerce market in Kazakhstan is the underdeveloped logistics infrastructure. Slow Delivery was the main problem that digital buyers in Kazakhstan faced when shopping online in 2017. To deal with this issue, Kazpost is working on opening new fulfilment centres to support online merchants in their delivery service needs. Another barrier is the dominance of cash on delivery as the payment method, yStats.com reports. Close to half of online shoppers used this method to pay for purchases made over the Internet in 2017.

Kaspi.kz - the local online store owned by Kazakhstan’s Kaspi Bank, was the largest online shop in the country in terms of revenue in 2017. A unique service of immediate online credit for the purchase is offered by the platform due to a special position in the banking structure. Moreover, the largest Internet holding company, Chocofamily, also based in Kazakhstan, saw rapid growth of its online shopping platforms. The online travel sector is led by Aviata.kz and Air Astana. Foreign-based stores, such as Lamoda and Wildberries, were also in the top 10 ranking, according to yStats.com’s findings.
# KAZAKHSTAN B2C E-COMMERCE MARKET 2019

## MANAGEMENT SUMMARY

## OVERVIEW & INTERNATIONAL COMPARISONS
- Overview of B2C E-Commerce Market and Trends, February 2019
- Selected Socio-Economic Characteristics, incl. Population, in millions, GDP, in USD million, Y-o-Y Change in GDP, in %, GDP per Capita, in USD, and GDP per Capita, PPP, in International Dollars, by Selected Countries in Central Asia & Caucasus, incl. Kazakhstan, 2019
- Internet Penetration, in % of Individuals, by Selected Countries in Central Asia & Caucasus, incl. Kazakhstan, 2017
- Share of Individuals Using the Internet to Pay Bills or Make Online Purchases, in % of Individuals, by Selected Countries in Central Asia & Caucasus, incl. Kazakhstan, 2017
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- Cross-Border E-Commerce Transactions with Cards Issued in Kazakhstan, by Value, in KZT million, and Volume, in thousands, 2013 – 2017
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- Product Categories Purchased Online, in % of Online Shoppers, 2017 & 2018
- Average Check in Online Shopping, in KZT thousand, by Product Category, December 2017 & December 2018
7  PAYMENT

- Share of Online Shoppers Paying Online Compared to Cash on Delivery, in %, 2017
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- Number and Value of Online Payment Transactions with Bank Cards, in thousands and in KZT million, and Share of Total Bank Card Payments Number and Value, in %, June 2018 - January 2019

8  DELIVERY

- Problems Encountered When Shopping Online, in % of Online Shoppers, 2017 & 2018

9  PLAYERS

- B2C E-Commerce Sales by Category of Players, in %, January - August 2018
- Overview of Top 10 B2C E-Commerce Companies, Ranked by Revenue, 2017
"Sport Goods" was the product category with the highest average E-Commerce check in Kazakhstan in December 2018.

Kazakhstan: Average Check in Online Shopping, in KZT thousand, by Product Category, December 2017 & December 2018

Online stores generated the largest share of B2C E-Commerce sales in Kazakhstan between Jan. to Aug. 2018, reaching 61.8%.

Kazakhstan: B2C E-Commerce Sales by Category of Players, in %, January - August 2018
GENERAL METHODOLOGY OF OUR MARKET REPORTS

Secondary Market Research
- The reports are compiled based on secondary market research. Secondary research is information gathered from previously published sources. Our reports are solely based on information and data acquired from national and international statistical offices, industry and trade associations, business reports, business and company databases, journals, company registries, news portals and many other reliable sources. By using various sources we ensure maximum objectivity for all obtained data. As a result, companies gain a precise and unbiased impression of the market situation.
- Cross referencing of data is conducted in order to ensure validity and reliability.
- The source of information and its release date are provided on every chart. It is possible that the information contained in one chart is derived from several sources. If this is the case, all sources are mentioned on the chart.
- The reports include mainly data from the last 12 months prior to the date of report publication. Exact publication dates are mentioned in every chart.

Definitions
- The reports take into account a broad definition of B2C E-Commerce, which might include mobile commerce. As definitions may vary among sources, exact definition used by the source (if available) is included at the bottom of the chart.

Chart Types
- Our reports include text charts, pie charts, bar charts, rankings, line graphs and tables. Every chart contains an Action Title, which summarizes the main idea/finding of the chart and a Subtitle, which provides necessary information about the country, the topic, units or measures of currency, and the applicable time period(s) to which the data refers. With respect to rankings, it is possible that the summation of all categories amounts to more than 100%. In this case, multiple answers were possible, which is noted at the bottom of the chart.

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- Reports are comprised of the following elements, in the following order: Cover page, preface, legal notice, methodology, definitions, table of contents, management summary (summarizing main information contained in each section of report) and report content (divided into sections and chapters). When available, we also include forecasts in our report content. These forecasts are not our own; they are published by reliable sources. Within Global and Regional reports, we include all major developed and emerging markets, ranked in order of importance by using evaluative criteria such as sales figures.

Notes and Currency Values
- If available, additional information about the data collection, for example the time of survey and number of people surveyed, is provided in the form of a note. In some cases, the note (also) contains additional information needed to fully understand the contents of the respective data.
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METHODOLOGY OF OUR KAZAKHSTAN B2C E-COMMERCE MARKET 2019 REPORT

- This report covers the B2C E-Commerce market in Kazakhstan.
- The report starts with an overview of development of B2C E-Commerce in the respective country and international comparisons.
- Next, the "Trends" section provides an overview of the related market trends, such as M-Commerce and Cross-Border B2C E-Commerce.
- The section "Sales & Shares" includes the development of B2C E-Commerce sales, including historical sales and a forecast. Furthermore, this section shows information about B2C E-Commerce's share of the total retail market.
- In the "Users & Shoppers" section, a review of the development of Internet penetration is included. Moreover, a ranking of online activities of Internet users, including online shopping, is provided.
- Afterwards, the section "Products" shows the leading product categories purchased online.
- The next two sections, "Payment" and "Delivery", cover information related to delivery and payment methods most used by online shoppers. With regard to payment, data on online payment transactions with bank cards, such as number and value of transaction, is included.
- Finally, the "Players" section includes information about the leading B2C E-Commerce players, ranked by sales.
## PUBLISHED RELATED REPORTS

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TOTAL

CHOOSE YOUR PAYMENT METHOD
Choose Your Preferred Payment Method:

Credit Card
- VISA
- MasterCard
- American Express
- China UnionPay

Bank Transfer
Bank Transfer information will be provided to you in the invoice you receive following submission of an Order Form offline.

PayPal
An invoice will be sent via e-mail to the e-mail address as listed in the contact details below. Payment via PayPal will be made available upon receipt of the invoice.

CARD HOLDER
CARD NUMBER
EXP. DATE
SECURITY CODE**

**If you prefer, this can be communicated over the phone or via secured e-mail communication.

COMPLETE YOUR CONTACT DETAILS
An invoice will be sent to your company

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1. Introduction

1.1 All the terms and conditions apply to our entire order (the “Contract”) between yStats GmbH & Co KG and the customer. Terms and Conditions are subject to change at any time without prior notice. Based on the discretion of yStats GmbH & Co KG, the most current version of which is readily available on our website.

We reserve the right and conditions of all terms and conditions, which may express in written and oral communication. Deviations between these terms and conditions and the orders of the “Order Form” will be considered if and only if expressively agreed upon by both parties and in writing, limited to the case of custom research orders, at which point a written confirmation of the order form shall be sent.

2. Payment

2.1 Prices are exclusive of all taxes, duties, and VATs. All orders placed via the online shop are subject to the applicable tax and VATs.

2.2 Prices are net and without transportation costs, if applicable. Value Added Tax (VAT) is not applicable if the company or the institution does not belong to a list of VAT-exempted entities.

2.3 Payment terms are net 30 days from the invoice date unless otherwise agreed in writing. Failure to make payment on time may result in the suspension of further orders.

3. Rights of Ownership

3.1 Unless expressly agreed in writing, the contents of our offers may not be made available in whole or in part to any third party outside your organization.

4. Confidentiality

4.1 We hereby agree to keep any information that you disclose to us on your website. Such information shall be treated as confidential and will not be disclosed to any third party without your prior written consent.

5. Liability

5.1 We shall not be liable for any damages suffered by you as a result of our performance under this Contract, except to the extent that such damages are caused by our negligence or willful misconduct.

6. Force Majeure

6.1 In cases of unforeseen circumstances or force majeure, we shall not be liable for any delays or failures in performance of this Contract.

7. Governing Law and Jurisdiction

7.1 The terms and conditions of this Contract shall be governed by the laws of the country in which we are incorporated. Any dispute arising out of or in connection with this Contract shall be settled by arbitration in accordance with the rules of the arbitration institution.

8. Dispute Resolution

8.1 Any disputes arising out of or in connection with this Contract shall be settled by arbitration in accordance with the rules of the arbitration institution.

9. Termination

9.1 Either party may terminate this Contract at any time by giving written notice to the other party.

10. Governing Law and Jurisdiction

10.1 The terms and conditions of this Contract shall be governed by the laws of the country in which we are incorporated. Any dispute arising out of or in connection with this Contract shall be settled by arbitration in accordance with the rules of the arbitration institution.

11. Governing Language

11.1 The terms and conditions of this Contract shall be governed by the laws of the country in which we are incorporated. Any dispute arising out of or in connection with this Contract shall be settled by arbitration in accordance with the rules of the arbitration institution.