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Structural analysis of Kazakhstan's e-commerce market participants in the B2C segment

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Abstract. The article examines the current trends in the development of the e-commerce market in Kazakhstan using the example of the B2C segment. The growth of online retail trade in Kazakhstan has been exponential over the past 3-4 years, and the activity of entrepreneurs in this segment has led to the rapid formation of the necessary infrastructure aimed at meeting consumer demand. The purpose of the study conducted by the authors is to analyze the main subjects of the e-commerce market in the dynamics of their development and influence on the state of the market.

The study of agents of this market conducted by the authors using general scientific methods allowed us to identify the main trends and patterns of change in the structure of online services provided, the sale of goods via the Internet, and the improvement of payment and delivery methods. In addition, the authors focused on assessing the competitiveness of the market and identified trends in its monopolization. Despite the highly competitive nature of the e-commerce market, market pioneers have advantages that give them the opportunity to have a strong influence on the market, contributing to the emergence of potential barriers to entry in certain market segments. The results obtained allowed the authors to determine promising directions for the development of the B2C segment of the e-commerce market in Kazakhstan.

Keywords. E-commerce, marketplaces, online store, aggregator, payment agents, B2C, delivery agents.

Introduction

In the development of the modern market of Kazakhstan, e-commerce seems to be the most important component and integral part. Today, the development of e-commerce cannot be absent from the agenda of "Digital Kazakhstan". Electronic trading platforms (marketplaces) are creating a new economy in Kazakhstan and are having a significant impact on the daily lives of millions of Kazakhstani. At the same time, this market remains underexplored. This is due in part to the rapid pace of its development. The impact of the e-commerce market on the country's economy is expressed in changes in its structure, increased competition and the emergence of new types of activities, new market players and the complication of relationships in the market. For example, full-field services are gaining popularity in online markets, and the commercial policies of large vendors pose a potential threat to small and medium-sized online stores. At the same time, the emergence of dominant e-commerce platforms such as Amazon.com now allows small retailers to connect to online marketplaces while providing comprehensive fulfillment services [1]. In addition, the pandemic has made adjustments to these dynamics, so it is necessary to systematically and comprehensively study the B2C e-commerce market of Kazakhstan in the context of its main economic agents.

The research methodology is determined by the purpose and objectives of the research and includes an analysis of the degree of elaboration of the problem of the development of the e-commerce market, the development of the author's vision of the B2C market structure in the context of the main players, a comparative analysis of the results of the largest participants in the e-commerce market in Kazakhstan, which determines the understanding of the significance and role of a particular market participant and the nature of their interaction.

Problem statement

Currently, the e-commerce market in the domestic economy has become an objective reality. Its formation and development, especially of the B2C segment, is taking place at a very rapid pace, which necessitates the timely formation of the necessary legal and regulatory framework for the functioning and creation of institutional infrastructure. In this context, an analysis of the structure, the main market participants, their role and the nature of interaction in dynamics will allow us to comprehensively assess the potential and prospects for the development of the e-commerce market. The novelty of the study lies in the systematic presentation of the participants of the B2C e-commerce market, who were grouped into 5 groups, and the justification of their interaction through the analysis of performance indicators, which affects the achievement of the final goal. All 5 groups of participants are key players in the market, ensuring its effective functioning. Previously, in such a setting, the study of the e-commerce market, including its B2C segment, was not conducted. Currently, there is no systematic and comprehensive representation of e-commerce market participants in domestic legislation, which creates significant problems in market coverage by regulatory measures.

The purpose of the article is to systematically present participants in the e-commerce market and conduct a comparative analysis of the results of their activities to substantiate the

importance of their role and functions in the formation of individual market segments in the product context.

History

The writing of this material was preceded by a large research work, within the framework of which the substantiation of the theory of e-commerce and its market was carried out, an analysis of the conditions and factors of the development of the e-commerce market in Kazakhstan, an assessment of foreign experience in the formation of the e-commerce market, an analysis of the contribution of e-commerce to the development of trade in Kazakhstan [2].

The literature review that has been conducted has shown that there is a high level of interest in the e-commerce market among scientists. So, Huaqing Hu in his work "Reselling, consignment or In-Marketplace selling Mode? Competitive strategy for E-tailers to counteract online third-party marketplaces" [3] examines different ways of online sales.

The scientific literature provides recommendations on the creation of own logistics platforms [4] and optimal strategies for promoting online trading platforms based on scientific experiments [5, 6], as well as on the analysis of the implementation of blockchain technology, which facilitates the coordination of the manufacturer and the platform [7]. Online merchants receive information about individual consumer preferences with huge amounts of data. And if high-quality retailers receive this data, it benefits both the platform and the retailer [8]. Electronic trading platforms are also considered from the point of view of benefits for the consumer [9]. One of such issues of e-commerce market research remains the entry cost and membership services for consumers. Using a game-theoretic model, researchers have put forward a number of hypotheses [10].

Jia Shi's research "Voluntary information disclosure of an e-commerce platform under reselling, marketplace, and hybrid selling" is devoted to the topic of disclosure of information about the e-commerce platform during resale. In particular, about the voluntary disclosure of information about demand to the manufacturer [11].

In our opinion, in the conditions of the Kazakh e-commerce market, due to its practical significance, Yuelin Shen's scientific article "Price and advertising competition in an online marketplace: The tradeoff between quality and cost" [12] is interesting, which examines two subjects of the e-commerce market selling goods of different quality and value that compete online-a market where advertising is the only means of attracting customers.

Thus, there is a need to conduct a comprehensive analysis of the e-commerce market in Kazakhstan (using the example of the B2C segment) to determine the structure of market agents and directions of its development.

Research Methods

To achieve the set objectives, the following methods of scientific knowledge were used: comparative analysis of data on the largest suppliers and intermediaries in the Kazakhstan market, which made it possible to assess the potential market volumes, as well as the prevalence

of electronic commerce in the regional context; generalization, systematization of means and methods of payment allows us to determine their demand and applicability, the development of the logistics system and delivery - the demand for delivery methods; the historical and logical method made it possible, based on the analysis of the experience and practice of e-commerce development, to substantiate promising directions for the development of the e-commerce market in Kazakhstan.

Findings/Discussion

All participants in the e-commerce market in Kazakhstan in the B2C segment can be conditionally grouped into 5 types: suppliers (sellers, manufacturers), intermediaries (online platforms, Internet sites, marketplaces, online stores), delivery agents (postal courier, logistics companies), payment agents (payment systems, financial institutions), buyers (individuals, end consumers). Due to the lack of reliable information about the number of entities in this market, the analysis is carried out on the largest market agents, data on which are presented in the Forbes.kz study.

Kazakhstan's EC suppliers are represented by domestic and foreign companies of various sizes. Table 1 presents data on the largest companies that sell their goods and services through their own online stores for 2022.

Table 1. Major online stores of Kazakhstan on the B2C market

Name of the entity, head office and year of establishment	Segment	Revenue for 2022, in mln. USD	Revenue dynamics for 2022, in %	Average monthly traffic, thousand times	Average monthly number of completed online orders, thousand units	Average check, USD
1	2	3	4	5	6	7
Airastana.com (Air Astana JSC), Almaty, 2001	passenger transportation	65.15	-38	657	25.3	348.1
Sulpak.kz (Arena S LLP), Almaty, 2009	electronics	79.4	5	-	-	-
Mechta.kz (Mechta Market LLP), Astana, 2007	electronics	53.01	5	1,071	-	-
Technodom.kz (Technodom Operator JSC), Almaty, 2002	electronics	48.43	-5	6,000	25.9	290.2
Alser.kz (Gulser Computers LLP)	electronics	47.68	3	710	90.1	529.3
FlyArystan.com (JSC "Flyarystan Airline")	passenger transportation	42.5	3	233	42	84.4

Shop.kz (Bely Veter KZ LLP), Karaganda, 2000	electronics	38.03	-3	1,152	15.2	208.3
Scat.kz (SCAT Airlines JSC)	passenger transportation	21.3	42	n/a	31	56
Leroymerlin.kz (Leroy Merlin Kazakhstan LLP), Almaty, 2018	construction materials	3.3	-15	191	2.9	93.7
Euopharma.kz (Aqnet Group LLP), Shymkent, 2014	pharmacy	2.8	76	8,651	15	11.4

The data in Table 1 show that the largest online stores in Kazakhstan operate in the electronics and passenger transportation sectors, where competition is high, with higher store traffic and higher average check in electronics stores. The majority of the online shops presented here are also active in presenting their goods on marketplaces as well as on aggregators.

Intermediaries in the B2C EC market. Table 2 shows the largest intermediaries in the market, represented by electronic platforms and aggregators.

Table 2. The largest intermediaries in the Kazakhstan EC market in the B2C segment

Name of the entity, head office and year of establishment	Segment	Revenue for 2022, in mln. USD	Revenue dynamics for 2022, in %	Average monthly traffic, thousand times	Average monthly number of completed online orders, thousand	Average check, USD
1	2	3	4	5	6	7
Kaspi.kz (Kaspi Shop LLP), Almaty, 2014	Marketplace	2106.5	25	6,900	1,700	103.3
kaspi.kz (Kaspi Travel LLP), Almaty, 2020	Ticket Sales Aggregator	501.7	162	2,300	2,500	45.2
Wildberries.kz (Wildberries LLP), Moscow, 2004	Marketplace for the sale of various types of goods	205.9	30	-	-	-
Aviata (Aviata LLP), Almaty, 2013	Marketplace/ ticket sales	97.46	-39%	-	375	21.7
Jmart.kz (Jusan Mart LLP), Almaty, 2021	Marketplace	56.3	257	218	13.8	735.6
Glovoapp.com (GlovoKazakhstan LLP), Barcelona, 2015	Delivery of food and other goods	54.29	31	-	420.8	10.7

Halykmarket.kz (Halyk Bank of Kazakhstan JSC), Almaty, 2020	Marketplace	51.03	14	-	-	-
Wolt.com (Wolt Technologies Kazakhstan LLP), Helsinki, 2015	Delivery of food and other goods	42.64	53	-	-	20.2
Tickets.kz (TiketsKZ LLP), Almaty, 2008	Ticket Sales Aggregator	42.1	14	826	29.6	54.3
Chocotravel.com (Internet Tourism LLP), Almaty, 2013	Ticket Sales Aggregator	41.78	11	-	-	-
Kolesa.kz (Kolesa LLP), Almaty, 2006	Car ads website, aggregator	34.3	7	5,500	n/a	n/a
OLX.kz (OELIX Group LLP), The Netherlands, 2007	Ad site, aggregator	26.06	-53	n/a	n/a	n/a
Flip.kz ("Flip.kz" LLP), Almaty, 2018	Universal goods	23.5	-13	n/a	n/a	n/a
Lamoda.kz (Branch of Kupishuz LLC), Moscow, 2011	Marketplace of various goods, clothes	21.7	-33	n/a	20.6	91
Note – Compiled by the author based on the source [13]						

The undisputed leadership of the Kaspi.kz marketplace is demonstrated by these tables. The advantage of this marketplace is that it is integrated with Kaspibank and allows customers to apply for credit or installment payments for purchases online. This marketplace model is attractive to suppliers because it significantly expands the potential customer base and encourages them to actively work with the trading platform.

Kaspi.kz started its business by selling household appliances and electronics. It cooperated with large specialized stores. Gradually, other electronics stores began selling their goods in the marketplace, and the marketplace continued to improve: bonuses for purchases were introduced, and the ability to compare prices from different sellers appeared. Later, the coverage of product sectors began to actively expand: in 2022, the scope of the marketplace increased to 2 million products, including furniture, cosmetics, clothing, footwear, building materials. The marketplace began selling food online in 2022, in partnership with the Magnum network. In total, there are more than 70 thousand domestic companies that sell their goods on the market.

In 2022, the total revenue of the marketplace Kaspi.kz amounted to more than 2.1 billion dollars. [13] Taking into account the weighted average dollar exchange rate on KASE for 2022 (473.84 KZT), it is 994.98 billion KZT. As a result, Kaspi.kz's share of the B2C e-commerce market in Kazakhstan has increased to 83%. The condition of cooperation with suppliers, who are obliged to pay installments and interest on the loan, is a peculiarity of the marketplace.

One of the first intermediaries in the e-commerce market of Kazakhstan were specialized marketplaces in the field of sales of coupons, tickets for entertainment and air and rail transportation, food delivery, books, which seemed to monopolize the market, and the penetration of new players was inexpedient. However, the strategy of market penetration

chosen by Kaspi.kz has given a new impetus to its development and the redistribution of forces in the segment. The launch of Kaspi Travel's online ticketing service in late 2020 as a result of Kaspi.kz's acquisition of Santufei - an online platform for searching, booking and purchasing tickets, as well as the ability to purchase tickets on credit and in installments as a result of Kaspi Travel's integration with a bank that has its own payment gateway, and a system of fast return and exchange of airline tickets. These advantages have allowed the company to scale rapidly. It has become the best profile marketplace. Its worthy competitor is Aviata.kz.

Russian companies are expanding their presence among the large marketplaces on the territory of Kazakhstan. The largest of them is Wildberries. The assortment of the company includes about 28 million types of goods from 300,000 Russian and foreign brands. In 2021, the company launched direct deliveries from local businesses in Kazakhstan. Wildberries, in cooperation with representatives of Kazakh companies, began to open partner points of delivery and logistics. Now, in addition to selling their goods on the online marketplace, entrepreneurs, especially representatives of SMEs, can earn income from commissions for placing and processing orders.

Thus, trends in the development of the e-commerce market have shown that it is rapidly being monopolized by marketplaces due to the mass and rapid integration of companies into marketplaces, despite the remaining potentially high competition.

Payment agents in the B2C EC market of Kazakhstan. In the Kazakhstan market there are about 19 payment systems, which are operated by 22 commercial banks and 88 payment organizations, including Kazpost. Merchants in the e-commerce market use the acquiring services of these organizations to accept payment for goods and services from buyers using bank cards. Acquiring commission is a fee to the bank for accepting card payments from merchants, which the payment system operator receives for each transaction of the merchant when transferring funds from the buyer's account to the company's settlement account for payment of each purchase.

It does not matter which bank issued the buyer's plastic card and from which bank the merchant ordered the acquiring service - it does not affect the interest rate. The study of bank fees for acquiring service in different banks showed that they are almost the same, ranging from 1 to 4% depending on various factors. At the beginning of the pandemic, the National Bank of Kazakhstan introduced restrictions on the rate of purchase of services in order to stimulate the development of e-commerce, as well as to reduce the costs of businesses and contain the prices of goods and services for the population. Since May 1, 2020, the commission has been reduced from 2-3% to 1.5% for organizations in such socially important industries as education, medical services, pharmacies, municipal parking lots, toll roads, agricultural services, real estate transactions. Consequently, the value of cashback paid by banks to customers for using non-cash payment methods decreased. The importance of acquiring remains high as alternative non-cash payment methods (through QR, the system of fast payments and electronic currency) have not been massively developed. The complexity of QR payment system for EC merchants is that to accept QR payment from the buyer it is necessary to have a contract/terminal of the same bank.

According to the data of the Bureau of the National Statistics Agency of the Republic of Kazakhstan for Strategic Planning and Reform, the most preferred payment methods for orders

of Kazakh citizens in 2019-2022 will be bank payment cards, bank and postal transfers, and cash. At the same time, from year to year, the share of cash will decrease from 28.4 percent in 2019 to 22.6 percent in 2022, while the share of online payments will increase from 2.8 percent to 13.9 percent, respectively. Such changes are a consequence of the penetration of digital technologies in the field of financial services, which allow a closer integration with the global e-commerce market.

At the end of 2022 in the structure of payment methods increased the value of the indicator "digital social wallet, digital tenge", reaching the value of 0.1% of the population (Figure 1). Electronic money systems in Kazakhstan appeared after the introduction into the legislative sphere of rules regulating the activity of electronic money systems in the Kazakh market. In accordance with the Law of the Republic of Kazakhstan No. 11-VI "On Payments and Payment Systems" dated July 26, 2016, the National Bank of the Republic of Kazakhstan, banks and the national postal operator may issue e-money systems as issuers. In addition, electronic money issued by issuers on the territory of the Republic of Kazakhstan should be denominated only in the national currency of the Republic of Kazakhstan [15].

Currently, there are 27 e-money payment systems in the Kazakhstan market. Their issuers are 10 second-tier banks and JSC "Kazpost". Among the issuers, JSC "Kaspibank" and JSC "Halyk Bank of Kazakhstan" are independently managing their own electronic money systems [16].

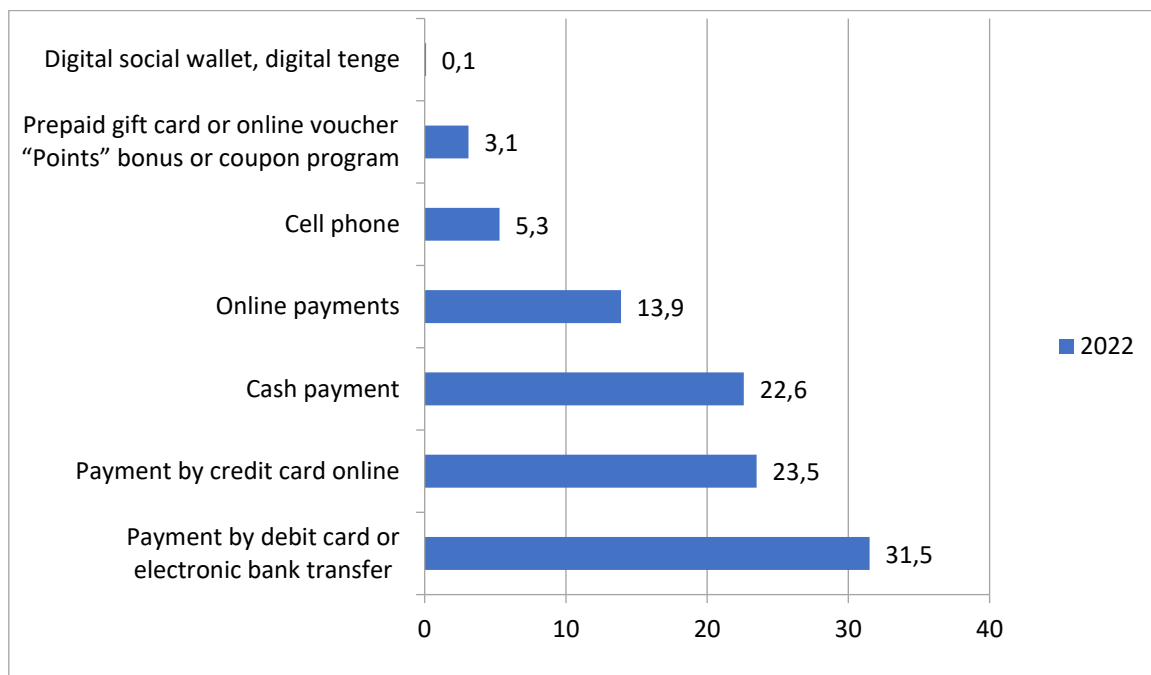


Figure 1. Payment methods used for goods and services in 2022, in %

Note – Compiled from the source [14]

Delivery agents in the B2C EC market of Kazakhstan. Kazakhstan has a relatively high level of home delivery – 95% [17], according to CAREC data. According to the data of the Bureau of the National Statistics Agency of the Republic of Kazakhstan for Strategic Planning and Reform,

Kazakhstanis, in bulk, prefer self-delivery as a method of delivery of goods ordered online. However, their share systematically decreases in the period from 2019, amounting to 35.3% in 2022 and giving way to "delivery directly to the buyer using the services of regular mail or other delivery methods", the share of which amounted to 46.9% (Figure 2). The online delivery category includes intangible digital products (music, videos, subscriptions to websites and magazines, etc.), ticket orders for cultural, sporting and other events, transport tickets, payments for advertising and others. Their share increased from 13.3% in 2021 to 17.8% in 2022.

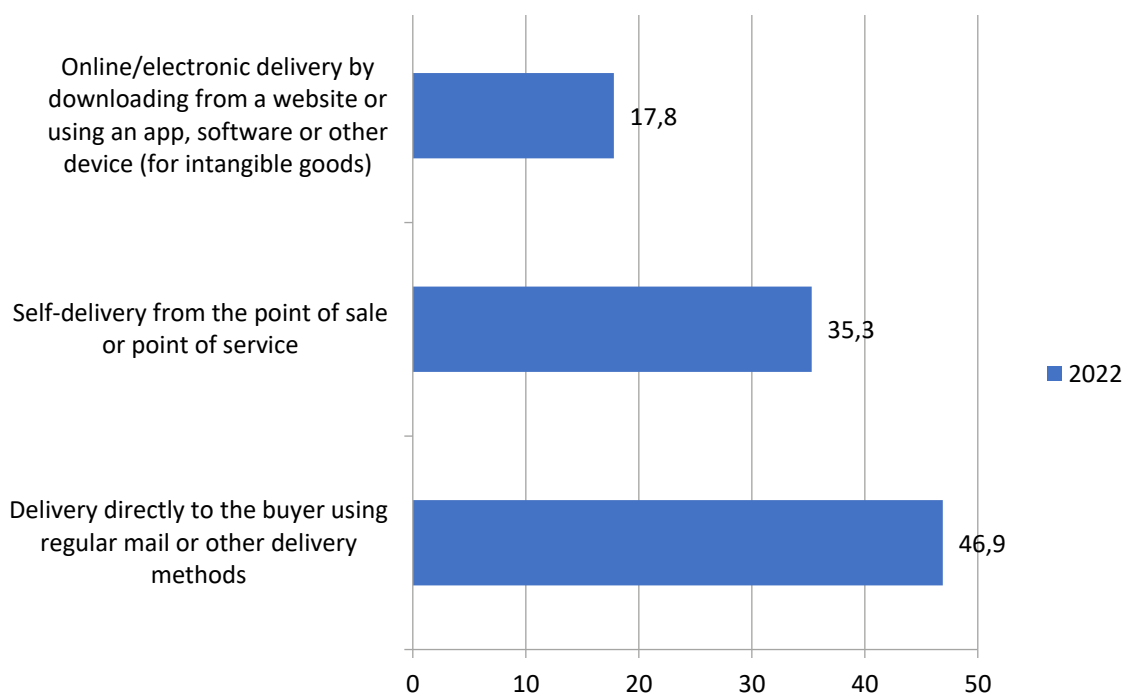


Figure 2. Used methods of delivery of goods in 2022, in %

Note – Compiled from the source [14]

The main players in the market are the national postal operator - Kazpost JSC, as well as major global companies (DHL, PONY EXPRESS, ASE, QSD, Exline, Post Express) and the local company Alem Tat. For January-December 2022 provided postal and courier services in the amount of 57855.4 million tenge, which in comparable prices by 0.5% less than the volume of January-December 2021. [18] IFO volume of postal and courier services amounted to 99.5% (in January-December 2021 - 122.1%).

The growth of the volume of parcels and packages in the Kazakhstan market since 2017 is due to the expansion of the geography of online shopping of Kazakhstanis, the development of online commerce, as well as the emergence of new companies and enterprises using courier services for the delivery of goods. The latter is due to the fact that maintaining an in-house courier service is often economically inefficient as it diverts significant additional resources, both financial and human.

Kazakhstan currently has 186 parcel supermarkets and 151 postamats. Kazpost JSC is expanding its network, including through partnerships with SMEs under the "franchising" model, and has more than 3,000 rural branches. This means that any existing company can contract with Kazpost to provide postal and financial services. SMEs benefit from the commission for the service provided, as well as the influx of new customers for their own business, and the customer gets a post office within walking distance.

It should be emphasized that none of the existing postal and courier services in the Kazakhstan market except Kazpost JSC has the material and logistic capabilities to deliver goods to remote regions of the country. Therefore, in order to fulfill their obligations to customers, mailers in the market are forced to combine and use various elements of networks, including the services of Kazpost JSC. This is a particularly acute problem when it comes to delivering to regional settlements and remote regions. The disadvantage of Kazpost JSC remains the long delivery time, which can be up to one month.

Consumers of B2C EC in the market of Kazakhstan. A portrait of the Kazakh Internet consumer was created by analysts of the Kazakh Association of Professional Public Opinion Researchers. According to it, the most active buyers in the B2C sphere, regardless of the online store, are young people of middle age (25-30 years old) with higher education. As a rule, they are family oriented and have an average income. At the same time, men purchase less frequently than women. However, the value of their average check is 48% higher. Free delivery and the level of service are the main reasons why Kazakhstanis choose an online store. Bonuses, cashback on bank cards, discounts on goods and various types of promotions are the next most important reasons [19].

The analysis of the structure of online purchases of Kazakhstanis for 2019-2022 shows that in the pre-pandemic period, the largest share of online purchases fell on cosmetics and toiletries (27.5%), clothing and footwear (11.8%), and mobile phones (11%). The share of these categories fell sharply in 2020, and in 2021 they did not reach the level they had in 2019. During the period of pandemic restrictions, the popularity of ordering office supplies jumped from 1.9% to 12.8%, while the share of buying medicines increased from 0.6% to 1.7%, coinciding with the peak of coronavirus incidence.

The habit of ordering mobile phones, computers and peripherals, and household appliances over the Internet not only persisted, but also increased significantly in the post-pandemic period. According to the official statistics for 2022, in the retail sector, the largest share of sales through their own Internet resource were goods for household use (34.7%), clothing, footwear and sporting goods (17.3%), food (13.2%), cosmetics (6.5%), medicines (4.8%) [14].

In the sphere of services there were also changes: if in 2019 the most popular type of services via the Internet was the sale of tickets for transportation, in 2021 the service of ordering food at home increased to 72%, and in 2022 the largest share in the volume of services provided through marketplaces is passenger transportation services - 50.3%, and further down - services for booking seats for transportation - 9.6%, services for delivery of food on order - 5.1% [14].

In general, Kazakhstanis began to spend more on goods and services produced in other countries, so their number increased from 9.5 million units in 2017 to 48.0 million units in 2022, with a total amount of 109.68 billion and 521.8 billion tenge, respectively (Figure 3).

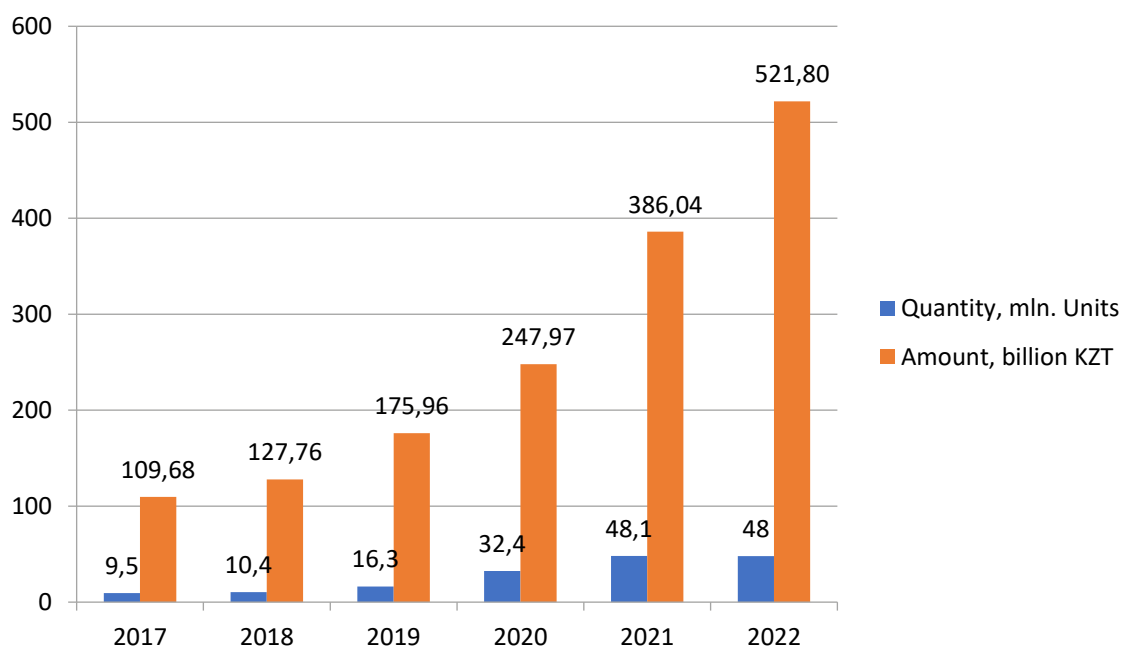


Figure 3. Dynamics of number and value of cross-border e-purchases by Kazakhstan citizens for 2017-2022

The analysis of the value of the average voucher for online purchases of goods and services in the regions of Kazakhstan showed that the higher the volume of sales in the B2C market, the lower the value of the average voucher. The low value of the average voucher and the high number of vouchers can be explained by better delivery conditions, which serve as a motive for frequent ordering. This is a trend that is characteristic of the large cities of Astana and Almaty (see Figure 4).

In some regions, a different trend is observed, when a small number of orders is carried out simultaneously with high values of average checks, for example, these are the southern regions of the country. The reason for this may be underdeveloped or undeveloped logistics networks and the mentality of people, when buyers consolidate their orders, making them less frequent but for a larger volume.

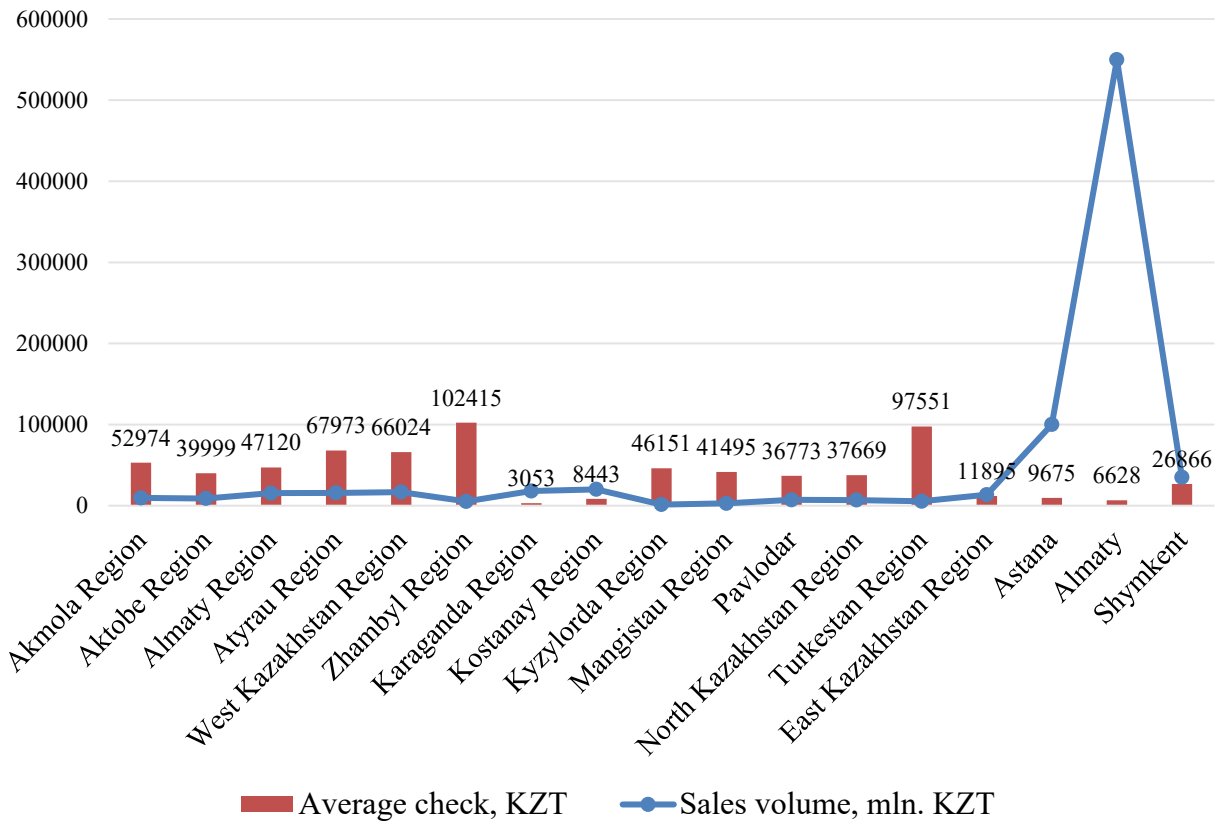


Figure 4. Regional Differences in Online Retail Volume and Check Values

Note – Compiled by the author on the basis of data [14]

Conclusion

Subjects of the e-commerce market in Kazakhstan in the B2C segment are represented by five types of agents: suppliers (commercial legal entities), intermediary platforms, delivery agents, payment agents, buyers (individuals). Large vendors - online stores are active in the electronics and passenger transportation industries. The largest market intermediaries are electronic platforms and aggregators.

In Kazakhstan's B2C e-commerce market, the segments of home appliances and electronics, clothing, food delivery, and ticket booking are quite developed, with a high level of competition limiting market entry for other players. Trends in the development of the e-commerce market have shown that it is rapidly being monopolized by marketplaces due to the mass and rapid integration of companies into marketplaces, despite the persistence of potentially high competition.

A well-developed payment infrastructure ensures the effective functioning of payment agents in the market. The most preferred payment methods for Kazakhstani orders in 2019-2022 are bank payment cards, bank and postal transfers and cash. In the structure of payment methods,

the value of the indicator "Digital social wallet, digital tenge" is gradually increasing, reaching a value of 0.1% of the population. This was facilitated by the development of the electronic money system in Kazakhstan, which appeared after the introduction into the legislative field of the rules governing the activities of electronic money systems in the Kazakh market.

Merchants in the e-commerce market use the acquiring services of financial organizations to accept payment for goods and services from buyers using bank cards. Acquiring service fees vary from bank to bank and range from 1% to 4% depending on a number of factors. The importance of acquiring remains high as alternative non-cash payment methods (through QR, the system of fast payments and electronic currency) have not been massively developed. The complexity of QR payment system for EC merchants is that to accept QR payment from the buyer it is necessary to have a contract/terminal of the same bank.

The most preferred payment methods for orders of Kazakh citizens in 2019-2022 will be bank payment cards, bank and postal transfers, and cash. In the structure of payment methods, the value of the indicator "digital social wallet, digital tenge" is gradually growing, reaching the value of 0.1% of the population. This was facilitated by the development of the electronic money system in Kazakhstan, which appeared after the introduction into the legislative sphere of rules regulating the activities of electronic money systems in the Kazakh market.

In Kazakhstan, the level of home delivery is quite high - 95 per cent. The majority of consumers prefer self-delivery as a method of delivery of goods ordered online, but its share systematically decreases in the period from 2019, amounting to 35.3% in 2022, giving way to "delivery directly to the buyer using the services of regular mail or other delivery methods", the share of which amounted to 46.9%. The largest delivery agent is Kazpost JSC, which has 186 parcel supermarkets, 151 postamats and more than 3,000 rural outlets, and its network is constantly expanding through partnerships with SMEs under the "franchising" model. The disadvantage of Kazpost JSC remains the long delivery time, which can be up to one month.

The portrait of the average Kazakh B2C Internet buyer is made up of young people of middle age (25-30 years old), with higher education, a family and an average income. At the same time, men purchase less frequently than women. However, the value of their average check is 48% higher. Free delivery and the level of service are the main reasons why Kazakhstanis choose an online store. Bonuses, cashback on bank cards, discounts on goods and various types of promotions are the next most important reasons.

The largest share in the volume of services provided through marketplaces is passenger transportation services - 50.3%, and further down - services for booking seats for transportation - 9.6%, food delivery to order - 5.1%. The volume of e-commerce in the B2C segment and the value of the average check are uneven across the regions of Kazakhstan and are characterized by a trend - the higher the volume of sales in the B2C market, the lower the value of the average purchase check, which can be explained by better delivery conditions that serve as a motive to order more often.

The conducted analysis has shown that the segments of food products, accessories for children are still unfilled in the market of e-commerce in Kazakhstan. Marketplaces that are present in the market, for example, arbuz.kz has a rather small coverage of types of goods, as well as suppliers. In the segment of children's accessories, there are only separate online stores for

traditional children's goods, and some highly specialized areas are sold in marketplaces. These areas remain promising for developing e-commerce and creating specialized marketplaces.

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Authors' contributions:

Azatbek T.A. – Development of research methodology and assessment of the level of knowledge of the problem.

Baitenizov D.T. – Text writing, critical analysis, technical design, translation, corresponding author.

Zhanbozova A.B. – Collection, processing, interpretation of data, formulation of conclusions.

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Структурный анализ участников рынка электронной коммерции Казахстана в сегменте B2C

Аннотация. В статье рассмотрены современные тенденции развития рынка электронной коммерции в Казахстане на примере сегмента B2C, так как именно розничная онлайн торговля в Казахстане имела взрывной рост в течение последних 3-4 лет, и активность предпринимателей в этом сегменте привела к быстрому формированию необходимой инфраструктуры, нацеленной на удовлетворение спроса потребителей. Целью проводимого авторами исследования является анализ основных субъектов рынка электронной коммерции в динамике их развития и влияния на состояние рынка.

Проведенное авторами исследование агентов данного рынка с помощью общенаучных методов позволило выявить основные тенденции и закономерности изменения в структуре предоставляемых онлайн услуг, реализации товаров через интернет, совершенствовании способов оплаты и доставки. Кроме того, авторы остановились на оценке конкурентности рынка и выявили тенденции его монополизации. Несмотря на высококонкурентный характер рынка электронной коммерции, пионеры рынка имеют преимущества, дающие им возможность сильного влияния на рынок, способствующего возникновению потенциальных барьеров входа на отдельные его сегменты. Полученные результаты позволили авторам определить перспективные направления развития сегмента B2C рынка электронной коммерции Казахстана.

Ключевые слова. Электронная коммерция, маркетплейсы, интернет магазин, агрегатор, агенты оплаты, B2C, агенты доставки.

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B2C сегментіндегі Қазақстанның электрондық коммерция нарығына қатысушылардың құрылымдық талдауы

Андатпа. Мақалада B2C сегменті мысалында Қазақстандағы электрондық коммерция нарығын дамытудың заманауи тенденциялары қарастырылды, өйткені Қазақстандағы бөлшек онлайн сауда соңғы 3-4 жыл ішінде қарқынды өсімге ие болды және осы сегменттегі кәсіпкерлердің белсенділігі тұтынушылардың сұранысын қанағаттандыруға бағытталған қажетті инфрақұрылымның тез қалыптасуына әкелді. Авторлар жүргізген зерттеудің мақсаты Электрондық коммерция нарығының негізгі субъектілерін олардың даму динамикасында және нарық жағдайына әсерін талдау болып табылады.

Авторлардың осы нарық агенттерін жалпы ғылыми әдістерді қолдана отырып жүргізген зерттеуі ұсынылатын онлайн қызметтер құрылымындағы өзгерістердің негізгі тенденциялары мен заңдылықтарын, интернет арқылы тауарларды сатуды, төлем және жеткізу әдістерін жетілдіруді анықтауға мүмкіндік берді. Сонымен қатар, авторлар нарықтың бәсекелестігін бағалауға тоқталып, оны монополиялау тенденцияларын анықтады. Электрондық коммерция нарығының жоғары бәсекеге қабілетті сипатына қарамастан, нарық пионерлерінің нарыққа күшті әсер ету мүмкіндігін беретін артықшылықтары бар, бұл оның жекелеген сегменттеріне кірудің ықтимал кедергілеріне ықпал етеді. Алынған нәтижелер авторларға Қазақстанның электрондық коммерция нарығының B2C сегментін дамытудың перспективалық бағыттарын анықтауға мүмкіндік берді.

Түйін сөздер. Электрондық коммерция, маркетплейстер, интернет-дүкен, агрегатор, төлем агенттері, B2C, жеткізу агенттері.

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