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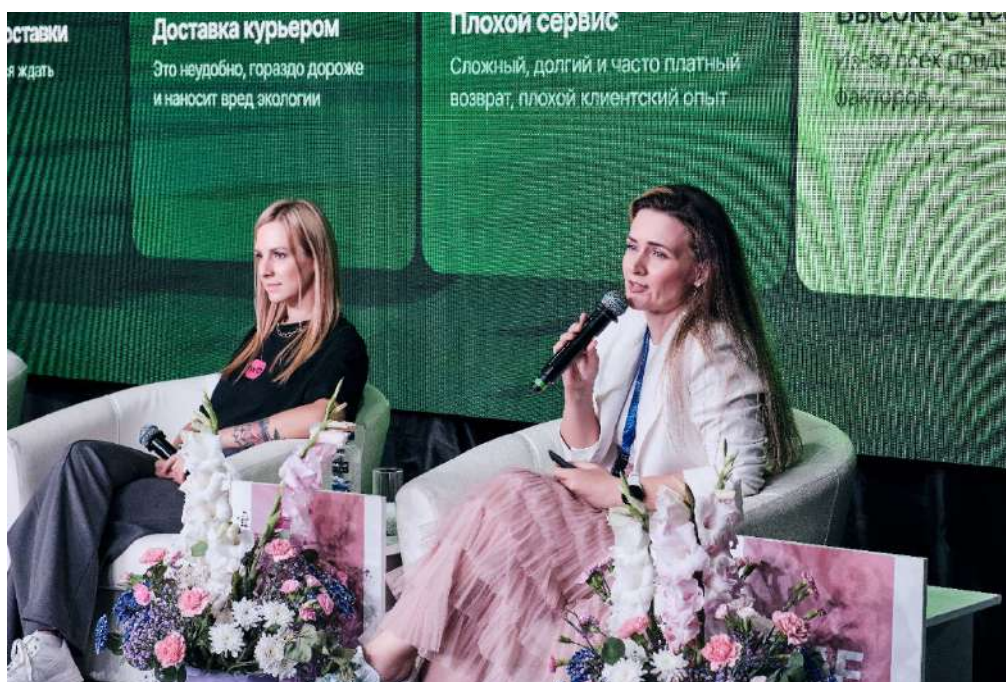
6 Международная Выставка обуви, меха, кожи и аксессуаров
6 International Exhibition of Footwear, Fur, Leather and Accessories

LEADING MARKETPLACES OF KAZAKHSTAN ON THE CAF PLATFORM

As part of the business conference of the 36th International Fashion Exhibition Central Asia Fashion Autumn-2025, a meeting was held with representatives of leading marketplaces in the Kazakhstan market. The session covered the advantages and features of working with each of the marketplaces presented, as well as product requirements, terms of cooperation, commissions and effective product promotion strategies.

The session moderator was Maxim Chernovanov, an online sales expert and entrepreneur who specialises in producing goods in China. The group of companies' revenues for 2024 is over 1 billion tenge and more than 2 million units of goods have been sold. He was the first to give the floor to Vera Nemkaeva, the vice president of commerce at the Teez marketplace. He noted that the team behind the Teez marketplace are specialists with extensive experience in building successful trading platforms. *«In six months, they did the seemingly impossible - they brought the project to stable sales. Today, there are more than 180 order pick-up points operating in Kazakhstan. »*

Vera Nemkaeva recalled that the team had previously launched two high-profile projects: Kazan Express, which was sold to Magnit in Russia; and Uzum Market, which became the number one marketplace in Uzbekistan. *«Thanks to our experience, we can confidently invite sellers to join our platform, safe in the knowledge that they can develop their business without taking unnecessary risks. In Kazakhstan, high shipping prices and complex logistics for returns and order delivery are two key pain points for sellers. We operate on an FBO model: you deliver your goods to our warehouse and we take care of the rest, including delivery,*



Vice President of Commerce at Teez Marketplace Vera Nemkaeva

returns and storage. Sellers can simply watch their sales grow in their personal account. Our company's advantages include transparent commissions that depend solely on the price of the goods and no hidden payments. Teez University provides partners with free training, Teez Studio conducts professional photography of goods and Teez Post guarantees fast delivery throughout Kazakhstan within 24 hours. For example, a blogger from Almaty used to sell goods on Instagram, adding the delivery cost to the price. She later joined Kaspi, but delivery there turned out to be even more expensive. She came to us, brought a batch of goods to the Almaty pick-up point, and now we deliver orders all over Kazakhstan without increasing the price for the buyer. »

The speaker added that the company has large warehouses in Karaganda, beautiful and very comfortable pick-up points, and its own fleet of vehicles. Where there are few pick-up points, Teez connects courier delivery to the door free of charge for the client.

Head of the Wildberries Development Department in Kazakhstan, Georgia, Kyrgyzstan and Tajikistan Evgeniya Savenkova-Petrichenko announced the latest data. This is about million products on the platform, 750 million products in warehouses, 20 million orders daily. Growth in 2024 was 81%, and the turnover was more than 4.1 trillion rubles. For storing goods, the company has 3 million square meters of warehouse space and its own fleet of 1,700 vehicles. The daily audience is almost 80 million unique users (statistics for March 2025), monthly - 87 million. 85% of sellers are small and medium businesses.

«When we launched, the key category was clothing. Today, the platform is so developed that no single category of goods dominates, we work in all directions. In 2024, we made a serious step forward. Wildberries is now represented in 10 countries: Russia, Belarus, Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Armenia, Georgia, China and the UAE. The last two countries are still in the full-fledged launch stage, but we are already present in these markets. Sellers, entering Wildberries, get the opportunity not only to quickly increase the number of orders, but also to immediately scale to 8 international markets. We pay special attention to the development of each local market. In the CIS countries, Wildberries ranks 3rd in terms of turnover, and sales of entrepreneurs in Kazakhstan have grown by 99% - this is the result of the work of our local offices, employees and active support of sellers, » - said Evgeniya Savenkova-Petrichenko.



Head of Development Department of Wildberries in Kazakhstan, Georgia, Kyrgyzstan and Tajikistan Evgeniya Savenkova-Petrichenko

Head of the Marketplace Department of Lamoda Kazakhstan Ainura Rakhimzhanova emphasized in her speech that Lamoda is not just a marketplace, but rather a fashion magazine and catalog, which contains the best offers in the fashion and lifestyle segment: *«We have several key advantages. Firstly, we have our own online platform, and secondly, we have a team of trained specialists. Rather than calling them 'try-ons', we*

refer to them as sales representatives, since they understand fashion and can advise consumers and present products competently. Another advantage is home delivery with the option to try items on. Clients can choose the most convenient option for them. Our company has its own delivery service in 15 cities and 20 pick-up points across the country. The most important thing is that we only cooperate with official brands, designers, and emerging brands that have registered trademarks. The cooperation formats are very convenient. One option is placement on the site with self-delivery, where you get a showcase on Lamoda and handle the logistics yourself. Alternatively, there is placement with delivery by Lamoda, where we take care of transportation, sales representative work and service organisation. »

Lamoda also provides active support to its partners. This includes marketing support, access to a 24-hour call centre and a personal account manager to support entrepreneurs throughout their journey.

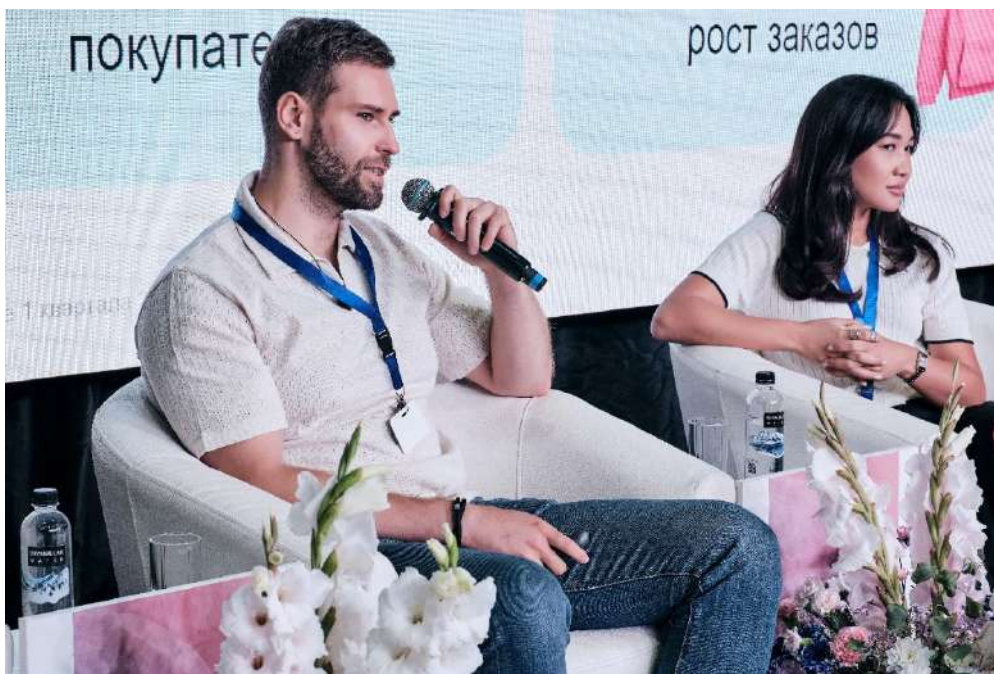


Head of Marketplace Department Lamoda Kazakhstan Ainura Rakhimzhanova

Ivan Sakharov, Head of the Seller Attraction Group at Ozon Fashion, noted the company's steady growth in the first quarter of 2025, in terms of both turnover and the number of goods presented and orders placed. This was facilitated by a developed logistics network comprising two large fulfilment centres in Kazakhstan, over 700 order collection points with fitting rooms (with more being added all the time) and the ability to transfer goods to OZON warehouses via collection points. A key advantage for sellers in Kazakhstan is that they gain access not only to the local market, but also to the entire OZON network in the CIS, including Russia, Kyrgyzstan and Belarus. The fashion sector is impressive in terms of its numbers: turnover in 2024 amounted to 380 billion roubles (the target for 2025 is 600 billion roubles), growth over the past five years has been 11.2-fold and the number of active buyers has increased to 38 million.

«How should you choose a work scheme? It depends on your priorities. Do you want to focus entirely on selling through the marketplace, or use a mixed model involving your own warehouses? If you have stable stock levels and product availability, you can work effectively directly from your warehouses. Successful sellers maintain a wide range of goods and ensure they are available, because it is important for buyers to be able to receive their orders quickly. They also create high-quality content — attractive photos and accurate descriptions increase conversion rates and attract relevant traffic. Successful sellers also invest in promotion, since advertising and marketing tools increase coverage and enhance the effect of the range and content», - the speaker gave professional advice.

There were many questions from the audience at the business session. One of them concerned the cost of professional product photography at Teez. Vera Nemkaeva explained that the cost of this service is included in the package: *«Essentially, your task when creating a personal account is to simply bring the product. We will label it, pack it and photograph it ourselves. We have personal managers who will help promote your product,*



Head of the Seller Attraction Group at Ozon Fashion Ivan Sakharov

especially if it is currently in demand. For example, if you say that you urgently need to get it ready for the school season, we will help prepare a large display case on time. »

Ainura Rakhimzhanova answered the question of expanding sales of brand collections from Kazakhstan in detail: *«We have a separate promotional line through which we actively promote and support local manufacturers. We tell the brand's story, engage in storytelling and carry out marketing activities. It is important to define the target audience immediately. Are you working with the A–B or C–D segments? This is a fundamental question. Would you prefer to sell a T-shirt for 100–200 thousand tenge to a select few customers, or sell 20–200 items to a wider audience for the same price, with the possibility of returns? Lamoda has been operating on the market for over 12 years and has built up a loyal customer base who recognise the brands and know where to buy them. If your brand appears on our platform, it will immediately gain recognition and trust from our audience. There is one important condition: the product must be in stock and the photos must be high quality. We have fairly strict criteria for selecting photos. For Lamoda, photos account for 90% of sales success. »*

An interesting question from the audience concerned the production and sales of Muslim clothing. Vera Nemkaeva answered the entrepreneur's concerns about possible returns of goods if sales are low: *«Here, everything is flexible. We issue a return certificate, and you can indicate how much you want to take through your personal account. Usually, this is a small volume of up to 400 units. However, I don't think it will come to a return. Teez actively promotes ethnic goods. A separate tab with the same name was recently added, and it has filled up well and shown excellent results in just a month and a half. We will soon be completely updating the interface, enabling even small sellers to get into the collections on the main page. This will be a separate function, the launch of which we will definitely announce. As a local marketplace, we can deliver goods throughout Kazakhstan in just one day. Imagine handing over the boxes and then just watching the orders come in, with no extra hassle. Unlike with the big players, it doesn't drag on for weeks, and there are no large fees for storage and acceptance. »*

A separate section of the business conference was devoted to the state of offline trade. Many entrepreneurs complain that sales in stores are falling, whereas sales in the multi-platform online environment are growing steadily and consistently. When discussing trends in e-commerce and marketplace development, as well as the decline in offline sales, Maxim Chernoiyanov emphasised the low base effect. *«For example, online sales already account for more than 50% of sales in China. Here, in Kazakhstan, Russia and other CIS countries, e-commerce is still at a level of 5-20%. We have room to grow, and we are doing just that. The base is increasing every month, so it seems that the growth is colossal. Marketplaces have simply chosen the right market — one*

that is developing organically. This was facilitated by the pandemic, which strengthened the trend towards online shopping, as well as other external factors. The offline sector will not disappear, but it will change. This is especially true of categories such as clothing, footwear and accessories, where emotions, fitting and visual contact with the buyer are important. However, the old models have not worked for a long time. Previously, for example, you could buy a white T-shirt for \$2 and sell it for \$10. A huge markup! This will not work now. Now, quality, a unique selling proposition and clear differentiation from competitors are important. Offline retail will definitely survive, but according to new rules. Therefore, if you have offline stores, you should strengthen them with online channels. Those who develop sales in both areas have a better chance of not only surviving, but also winning the competition. »



Online sales expert and entrepreneur Maxim Chernovanov

Ivan Sakharov gave slightly different figures: «The share of the online economy in Russia's developed territories within the CIS is currently around 21%, and forecasts suggest it will grow to 28-29% within three years. In Asia, according to our data, China has not yet reached 50%, but is close to doing so. 2024 was a turning point, with the share of online sales exceeding offline sales for the first time. Now, online purchases occupy a large part of the market. Today, platforms are working to help local brands develop, including new and little-known ones. Our mission is to act as a liaison between buyers and brands. This is particularly important for new manufacturers because, despite the high quality of their goods, it is difficult for them to provide an effective and inexpensive sales channel. Offline stores require costs for rent, staff, cash registers and stock. Even taking into account the commission, marketplaces are a scalable and accessible channel with wide audience coverage. At the same time, there will always be demand for offline shopping. There is an audience that values a personal shopping experience and this will not change. Yes, the share of online sales will grow, but offline shopping will continue to thrive. »

The speaker added that marketplaces also experience sales declines: «We do not idealize the market, we just know how to work with such situations. Each brand has an account manager who analyzes sales dynamics weekly. If we see a decline, we meet with a partner and look for the reason: seasonality, change in product range, changes in demand. For example, in August, almost no one buys summer clothes, demand shifts towards school collections. Our task is to prevent sharp declines, and not just record them. »

Evgeniya Savenkova-Petrichenko noted that the growth of marketplaces is a natural result of a combination of many factors: «Firstly, the most significant impetus to the industry was given by the pandemic period, when we all went online. Secondly, the consumer has noticeably «grown younger»: the new generation spends much more time online. Offline points are becoming less profitable: high rent, salaries, utility bills, taxes are a heavy burden for entrepreneurs. However, offline will definitely not disappear. For example, in China, most shopping

centers operate in the showroom format: the buyer comes, studies, touches and tries on samples, and orders online. This hybrid approach preserves the value of offline and increases online sales. In fact, sales are not falling, they are simply flowing from one channel to another. The client today has become more demanding: they want quality, style, affordable price and fast delivery. Those who quickly react to trends and deliver exactly what the audience needs here and now win. The market has accelerated. A product that was at the top a week ago can quickly lose its relevance. Whoever was the first to offer a new product and deliver it to the client, gets the profit. Therefore, today it is impossible to work according to models even from three years ago: development must be constant, daily. »



CAF experts believe that offline trade will live, but under new rules

The speaker also drew the audience's attention to understanding the needs of their clients and the need to study the target audience: «It is wrong to work on one platform and evaluate it based on the principle: «But it works differently there. » Each platform has its own audience, with its own behavior and habits. That is why we use a special tool – «Buyer Jam». It allows you to track how the client behaves on a specific platform, what he pays attention to, what product cards he views, what decisions he makes. Even on such large marketplaces as Wildberries and Ozon, buyers react differently. What sells well on one platform may not «go» at all on another. Therefore, it is important not to focus on someone else's experience from another market, but to test and understand your client here. On four different marketplaces, you can have four completely different «working» cards. »

Ainura Rakhimzhanova received an important question from the audience about the criteria for selecting goods on Lamoda, especially from the CIS countries. The speaker answered that any entrepreneur can place an order on the platform if they have the necessary documents permitting trade in Kazakhstan, including online: «Although our checks are above average, we attract new customers, who usually start with small orders. They usually start with affordable goods, such as items costing 10,000 tenge, and once they are satisfied with the quality, they progress to more expensive purchases, such as items costing 20,000, 30,000, 100,000 or even 200,000 tenge. There is stable demand for mass market goods on our platform, and there is always a buyer for them. However, it is important to remember that we analyse both your price category and the availability of goods. Before entering the marketplace, you need to clearly understand its specifics. If it is a fashion platform, start with fashion and then expand to other categories. Your involvement is also important. You can't just upload a product and wait for sales. If something doesn't sell, you need to work with us to analyse the audience, adjust the range and look for joint solutions. This is a joint effort, not a one-way process. Consumer behaviour also changes every year. The trend is currently shifting towards environmental friendliness. People can buy a simple cotton T-shirt for 5,000–10,000 tenge, but at the same time invest in expensive accessories, such as shoes, bags and caps. They can be taught to appreciate environmentally friendly, high-quality products. Our platform has different target audiences. While women and young mothers used to predominate, men have actively joined in since 2024, paying much more attention to their image.

Now, the buyer ratio is about 50/50. We have strict content guidelines: nowadays, it's not just products that are sold, but emotions too. It is important for buyers to see the person behind the product — its real face, individuality and history. This could be an ideal model or a girl with freckles or a prosthetic hand, for example — anything that evokes sincere emotions and associations in the buyer. This catches the eye and motivates people to make a purchase. »



Experts at the CAF business conference revealed the subtleties and nuances of working on large marketplaces

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