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Emerging trends in cross-border e-commerce in Central Asia: towards regional cooperation?

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The Central Asian e-commerce market was valued at USD 14.7 billion in 2024 and is projected to grow to USD 182.2 billion by 2033, with a CAGR of 30.63% from 2025 to 2033 (IMARC report, 2025);

In 2022, PRC and the five Central Asian countries signed the **Joint Initiative on High-quality and Sustainable Development of Economic and Trade Cooperation**, underlining cross-border e-commerce as a main pillar of regional trade

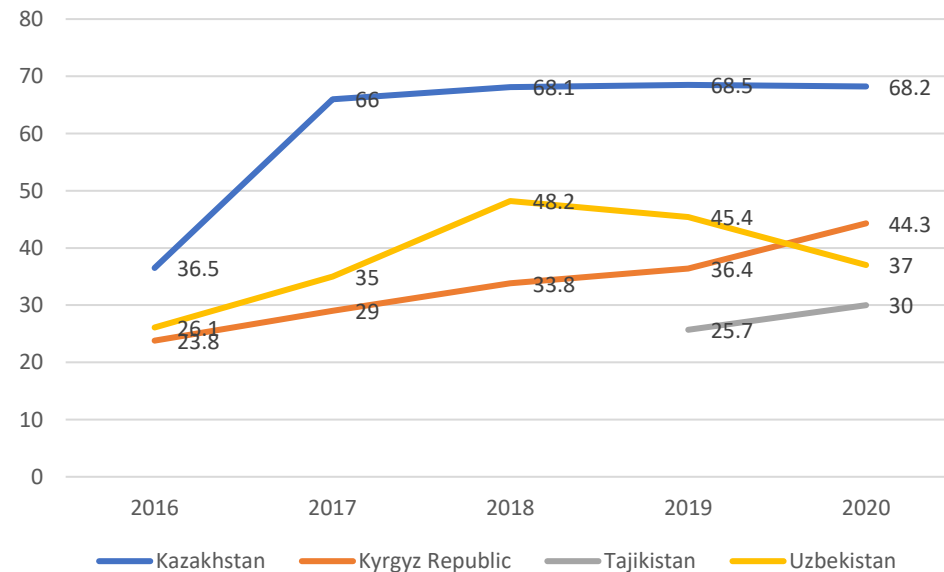


UNCTAD B2C E-commerce Index

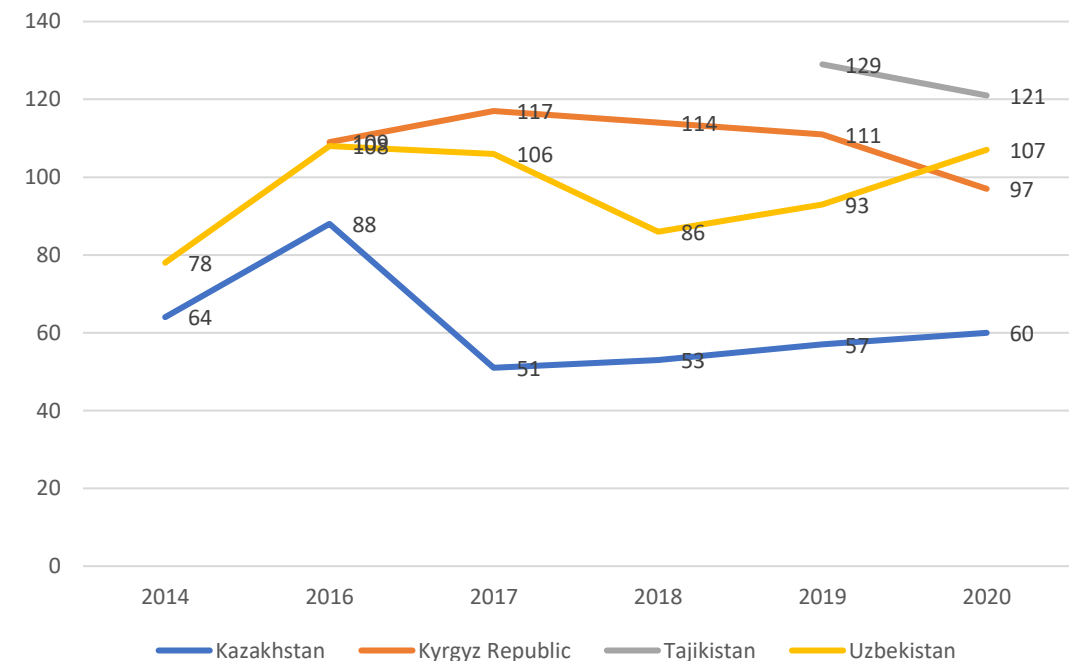
It measures the economy's preparedness to support online shopping. The index consists of four indicators that are highly related to online shopping and for which there is wide country coverage:

- Share of Individuals Using the Internet;
- Share of Individuals with An Account (15+ yo);
- Secure Internet Servers;
- Universal Postal Union (UPU) Postal Reliability Score

UNCTAD B2C E-commerce Index (0-100)



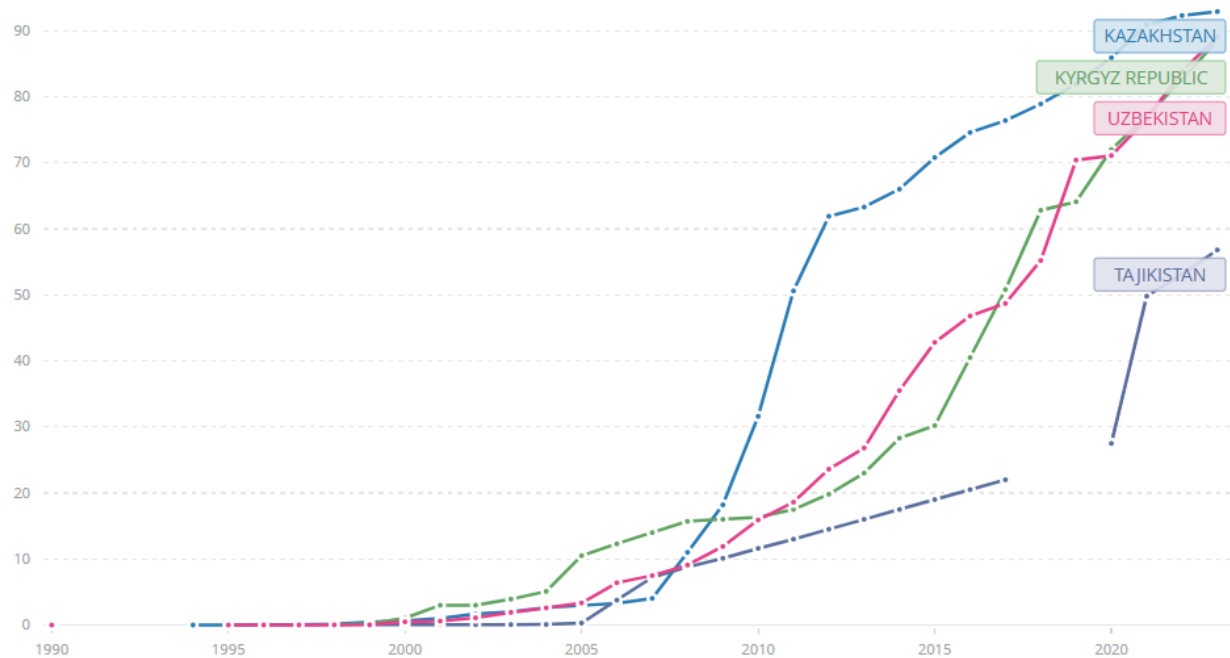
UNCTAD B2C E-commerce Index Rank





General Information

Individuals using the Internet (% of population)



Fixed broadband subscriptions:

- Kazakhstan – 2.9 million
- Kyrgyz Republic – 456,000
- Tajikistan - 6,000
- Uzbekistan - 10.79 million



Kazakhstan

- The share of e-commerce (domestic trade) in the total volume of retail trade in 2024 (including marketplaces) was 14.1%, showing a consistent growth each year;
- In 2024, local marketplaces like Kaspi.kz, Halyk Market, and Forte Market made up 65% of total sales, while international ones accounted for 26%;
- Kazakhstanian consumers spent 628 billion tenge (around 1.34 billion USD) on purchases from foreign online stores in 2024;
- Kazakhstan is Wildberries' third-largest market after Russia and Belarus;
- Around 120,000 registered Kazakhstan-based sellers are represented on Wildberries;
- The establishment of a joint venture between QazPost and YTO, PRC's leading express delivery company;
- Kaspi.kz and Alibaba's Alipay and Tencent's WeChat Pay integration;



Kyrgyz Republic

- The domestic e-commerce market rose to USD 359.2 million in 2024, a 14.3% increase from the previous year, making up 7% of total retail trade;
- Mbank service with 12,000 products;
- The Kyrgyz Republic-based entrepreneurs (+125% in 9 months of 2024) registered on Wildberries and an increase in sales by 113% in monetary terms compared to 2023;
- Clothing accounts for over 90% of sales of all Kyrgyz products on Russian-led platforms;
- The most popular Chinese e-commerce platforms are AliExpress, Alibaba, Taobao, Pinduoduo, 1688 and Temu.



Tajikistan

- Tajikistan is one of the smallest e-commerce markets in Central Asian region;
- Statista projects Tajikistan's e-commerce market's revenue to reach 440 million USD in 2025;
- The domestic e-commerce is represented by large platforms such as somon.tj, magnit.tj and alif.shop offering different types of goods, products, electronics etc.;
- Russian-led Wildberries entered Tajikistan's market in April 2025 – now, residents of Tajikistan can place orders through the official Wildberries.tj app and website with delivery to Dushanbe and Khujand only;
- JanaPost, Tajikistan's logistic company, has launched delivery from one of PRC's largest marketplaces, Pinduoduo, to Tajikistan in April 2025;
- The e-commerce ecosystem in Tajikistan is only being formed in the republic;



Uzbekistan

- Uzbekistan's e-commerce market is one of the fast growing in the region. Its market revenue is projected to reach 1.84 billion USD in 2025;
- Its online commerce in Uzbekistan makes up only 3 percent of its total retail turnover;
- Uzum Market, being a digital ecosystem combining e-commerce, banking, delivery service, and fintech, is the largest and most prominent local marketplace, which became Uzbekistan's first tech unicorn in 2024 with a valuation over 1 billion USD;
- sales of Uzbek goods in Belarus increased by 124% year-on-year, in Kazakhstan (+140%), in the Kyrgyz Republic (+192%) and in Armenia (+23%) with Russia being the main buyer of Uzbek textiles;
- Block the access to the Temu, Chinese marketplace, from March 20, 2025, urging customers to stop purchases and seek refunds for pending orders in Uzbekistan.

Legislation

Kazakhstan	Kyrgyz Republic	Tajikistan	Uzbekistan
Ratification of EAEU Protocol on Amendments to the Treaty on the Customs Code of the Eurasian Economic Union dated April 11, 2017	Ratification of the Protocol on Amendments to the Treaty on the Customs Code of the Eurasian Economic Union of April 11, 2017,	Law “On Electronic Commerce” in December 2022	law on “Electronic Commerce” in 2022
Duty-free limit for goods imported into the EAEU: 200 euros or 31 kg		Law “On Payment Services and the Payment System” in 2017	Cabinet approved a resolution to advance e-commerce development in December 2024
Law No. 18-VIII on Online Platforms and Online Advertising	Law on Electronic Commerce since 2022		
The E-Commerce Development Plan until 2027	The special tax regime, e-commerce tax, replaces income tax, 12% VAT, and sales tax with a single 2% rate.		
The new Tax Code that will enter into force in 2026 introduces higher VAT in the amount of 16 percent (now it is 12 percent)	The Programme for the support and development of electronic commerce in the Kyrgyz Republic for 2023-2026		

Conclusion

- The common challenges: necessity of infrastructure development, including digital infrastructure, improvement of logistics and delivery capabilities, supportive regulatory framework, and enhancement financial and digital literacy.
- The shared opportunities: the rapid growth of e-commerce, the potential for SMEs to accelerate exports to larger markets and participate in the global supply chain reaching distant countries, and the expansion of public–private partnerships.
- Overall, cross-border e-commerce has the potential to serve as a key driver for optimizing trade structures and fostering high-quality economic development.
- To speed this, regional cooperation matters.



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Thank you for your attention!

Рахмат!

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