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## ANALYSIS OF THE AVIATION SERVICES MARKET OF THE REPUBLIC OF KAZAKHSTAN

### АНАЛИЗ РЫНКА АВИАЦИОННЫХ УСЛУГ РЕСПУБЛИКИ КАЗАХСТАН

### ҚАЗАҚСТАН РЕСПУБЛИКАСЫНЫҢ АВИАЦИЯЛЫҚ ҚЫЗМЕТТЕР НАРЫҒЫН ТАЛДАУ

**Abstract.** In order to accelerate the integration processes of the Kazakh transport complex into the international transport system and develop the country's transit potential, a competitive environment for the provision of transport services has been created. The transport sector of Kazakhstan is developing taking into account the formation of sectoral complexes of the national economy of the republic (agro-industrial, fuel and energy, mining and metallurgical, construction and others), ensuring the relationship between sectors of the economy and regions.

**Key words:** market analysis, transport sector, logistics system, airspace.

**Аннотация.** В целях ускорения интеграционных процессов казахстанского транспортного комплекса в международную транспортную систему и развития транзитного потенциала страны создана конкурентная среда оказания транспортных услуг. Транспортный сектор Казахстана развивается с учетом формирования отраслевых комплексов народного хозяйства республики (агропромышленного, топливно-энергетического, горно-металлургического, строительного и других), обеспечивая взаимосвязи отраслей экономики и регионов.

**Ключевые слова:** анализ рынка, транспортный сектор, логистическая система, воздушное пространство.

**Андатпа.** Қазақстандық көлік кешенінің халықаралық көлік жүйесіне интеграциялық үдерістерін жеделдету және елдің транзиттік әлеуетін дамыту мақсатында көлік қызметтерін ұсынудың бәсекелестік ортасы құрылды. Қазақстанның көлік саласы республиканың ұлттық экономикасының салалық кешендерінің қалыптасуын (агроөнеркәсіптік, отын-энергетикалық, тау-кен металлургия, құрылыс және басқалары) ескере отырып дамып келеді, экономикалық салалар мен аймақтардың өзара байланысын қамтамасыз етеді.

**Түйін сөздер:** нарықты талдау, көлік секторы, логистикалық жүйе, әуе кеңістігі

### Introduction

To create favorable conditions for attracting investments in the development of the trading system of Kazakhstan, a competitive transport and logistics system will be developed. Against the background of the growing freight and passenger turnover of the country, the transport industry will undergo transformations by introducing effective management

mechanisms, electronic services, and new technologies.

Kazakhstan is located in the center of the communication flow between Europe and Asia and has a huge transport potential, which is able to realize the national transit resource. This unique geopolitical position must be exploited. In fact, when carrying out intracontinental transportations on most routes in the North-South and West-East directions, the region cannot be rounded, which thereby represents the strong side of the Central Asian transport corridors.

The development of the Kazakhstani air transportation market in recent years is determined by the stable macroeconomic indicators of the republic. Economic growth was supported by a favorable situation in the world market of raw materials, growing demand for Kazakh export goods as a result of economic recovery in the EU and China. Also, a certain contribution to the growth of the economy was made by the commissioning of new production facilities under the state industrialization program.

Currently, the country is actively working on reforming the transport complex of the republic.

In the field of civil aviation, further reconstruction of the runways, as well as airports and air terminals in the country's cities will continue. These activities are intended to increase the country's attractiveness as a transit transshipment center in Central Asia.

Civil aviation should go beyond the existing framework and cover with its services not only intercity communications, but also promising regions of the country, creating all the conditions for the development of small aircraft.

For better and better airport operation, it is necessary to solve the problems in the civil aviation industry:

- imperfection of the current legislation in the field of civil aviation and insufficient compliance of its structure and content with international legislation;

- the lack of a unified approach to the regulatory legal acts of other industries that have an indirect but significant impact on the civil aviation industry (antimonopoly, tax, customs and other legislation);

- imperfection of the state safety control system in accordance with ICAO requirements;

- poor technical equipment and deterioration of the ground infrastructure of airports (50%);

- outdated aircraft fleet;

- insufficient development of competition in the air transportation market;

- a small number of operating aerodromes of local air lines;

- inadequate equipment of aerodromes with precise approach systems and visual aids to ensure operation in adverse weather conditions;

- significant wear of special equipment, lighting equipment and power supply equipment, communications;

- lack of the required level of equipment of the air transport infrastructure with ground equipment, cargo warehouses and terminals.

Main part. Kazakhstan, having an inland location, needs active development of air transport.

The main principles for improving the air transportation market are:

- meeting the needs of the population and business communities of Kazakhstan and other states in air transportation;

- development of the market for freight and passenger transportation within the republic and abroad;

- increasing the competitiveness of Kazakhstani air carriers and airports in regional and global markets.

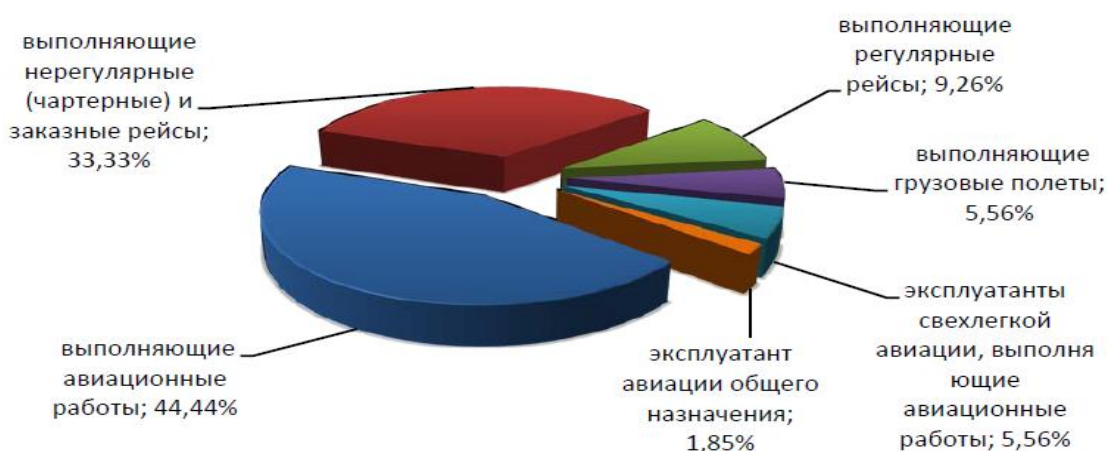
At the same time, increasing economic growth in the country requires the advanced development of transport services to meet the growing demand for transportation.

The successful solution of strategic tasks to ensure a stable rate of economic growth of the country, its security and defense capability, rational integration into the world economy and, accordingly, becoming one of the 30 most competitive countries in the world cannot be ensured without advanced rates of development of the transport system infrastructure.

The impact of the factors of expansion of external and internal consumer demand made it possible to ensure real GDP growth in 2021 by 6.0% compared to the previous year.

At the same time, the growing income of the population is a stimulus for the growth of the sector of tourist air transportation and flights of citizens in connection with the maintenance of social contacts with relatives and friends, both in Kazakhstan and abroad, which is a factor in increasing the mobility of the population.

In the republic, 56 airlines and aircraft explants operate, of which 5 airlines are involved in regular flights, 20 carry out irregular transportation, 3 airlines for cargo transportation, 28 explants perform aviation work: aviation chemical, forest patrolling, overflight of oil and gas pipelines and other types works.



*Figure 1. - Share of Kazakhstani airlines by destination*

According to forecasts, by 2023, the number of domestic flights in Kazakhstan will increase by 50%, the number of international air routes - by 1.5 times. At the same time, the growth of passenger traffic will be 70%. In this regard, in 2022, it is necessary to complete the reconstruction of runways at the airports of all regional centers.

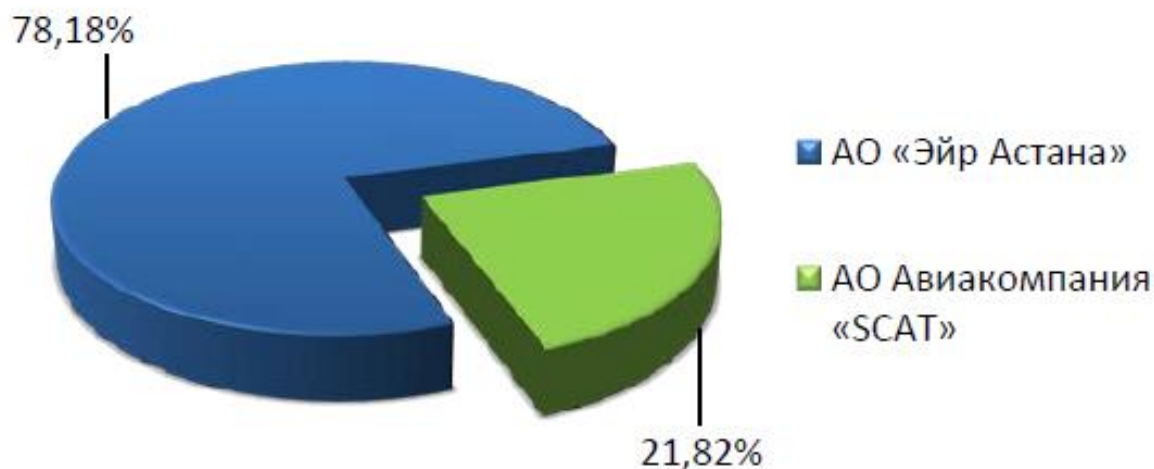
One of the important functions of aviation remains the task of providing domestic passenger and cargo transportation. In order to develop the domestic air transportation market, today the department canceled the system of tenders for the distribution of domestic routes and carried out liberalization, as a result of which the number of flights on domestic airlines increased by 20%.

As part of the implementation of the State Program for the Development of Transport Infrastructure until 2025, work continues in the civil aviation industry to expand the infrastructure of airports. In particular, today at the country's airports, 13 landing strips and 9 terminals have been reconstructed. As for the airports of regional centers, their reconstruction will be fully completed by 2021.

Much work has been done to further develop the transit potential of the republic, the effective use of which is a measure aimed at generating additional revenues for civil aviation and maintaining the high dynamics of its development.

Currently, a set of measures is being actively implemented to form the airspace structure and route network based on the requirements of international standards.

Currently, 95% of passenger traffic is carried out by Air Astana and SCAT airlines. The share of Kazakhstani companies in the international communications market is 54%.



*Figure 2. - Shares of Kazakhstani airlines performing regular international flights.*

Kazakhstani air carriers such as Air Astana JSC, SCAT JSC operate flights on the territory of 18 foreign countries. 30 foreign airlines from 18 countries of the world carry out regular passenger flights to Kazakhstan. In the field of domestic flights, there are regular flights on 46 routes.

Conclusion. As part of the implementation of the State Program for the Development of Transport Infrastructure until 2023 in the civil aviation industry, work continues to expand the airport infrastructure, which would allow our airports of the Republic of Kazakhstan to improve the quality of passenger and cargo service and meet all ICAO requirements to be competitive in the global civil aviation market.

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