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DYNAMIC ANALYSIS OF CONSUMER LOYALTY FAST-MOVING CONSUMER GOODS MARKET IN THE REPUBLIC OF KAZAKHSTAN

Abstract

As a result of the formation of new geopolitical, economic, and social conditions, the consumer goods market is undergoing high volatility, which entails significant changes. At the same time, the transformation concerns not only the behavior of consumers but also the marketing policies of companies selling goods from the fast-moving consumer goods sector. The scientific article presented the current indicators of the fast-moving consumer goods (FMCG) market in the Republic of Kazakhstan. The results of changes in the economic profile of consumers are given based on the interpretation of the survey data. The article aims to study the impact of consumer behavior transformation on Kazakhstan's consumer goods (FMCG) market. The following research methods were used in the study: statistical analysis, survey, and in-depth interview. As a result of the study, the economic characteristics of the market were reflected based on the results of a statistical cross-section of 2022 the three quarters. The forecast of further transformation of the market and the explanation of individual trends was formed based on the data from the conducted expert interview. Accordingly, in a three-stage study, up-to-date data on the volume and structure of the FMCG market were obtained, a modern economic portrait of the consumer was derived, and the possibilities for improving consumer loyalty in the Republic of Kazakhstan were assessed. Local FMCG and retail companies can use final data in the processes of building sales strategies and studying the behavior of a modern consumer, as well as in the formation of sales policy and tactical decisions. These studies may be relevant for companies that still need their analytical tools.

Key words: fast-moving consumer goods, market structure, economic profile, loyalty index, expert interview, consumer survey.

Introduction

The market for consumer goods is developing and transforming under the influence of geopolitical, economic, and social factors. Along with other sales areas, the FMCG market is defined as being sensitive to a decrease in household income, an increase in the cost of products, and changes in consumer behavior in a volatile environment.

Based on the characteristics of the described segment and in connection with the prevailing conditions, the importance of regularly monitoring individual market trends for effective tactical decisions is increasing. The particular significance of the market is determined by guaranteeing the food supply of the country's population in the face of the disruption of traditional supply chains. The daily need for products from many consumers and the high frequency of purchases largely determine the state of the market. At the same time, the increase in prices, as well as the economic situation in the country, defines the rise in consumer involvement in the process of purchase making. In connection with the above conditions, identifying modern trends in the FMCG market is an urgent issue at the national, commercial, and consumer levels, which determines the topic and scope of the study.

The FMCG market of the Republic of Kazakhstan was chosen as the object of study. The subject of the study was the development of the FMCG market based on changes in consumer behavior.

The work aimed to study the impact of the transformation of consumer behavior on the market of consumer goods (FMCG) of the Republic of Kazakhstan.

The main objectives of the study were established following the stages of the analysis:

1. Assessment of current indicators of consumer loyalty;
2. Description of the volume and structure of the market of the FMCG sector of Kazakhstan based on the statistical cut in the Nielsen database;
3. Conducting an expert interview to clarify individual trends and indicators.

Specific methods and tools were chosen following the objectives of the scientific article.

Materials and methods

Modern characteristics of sales markets are determined by studying individual companies selling products and from the standpoint of changing consumer profiles.

Based on this, economic indicators characterizing the consumer goods market and individual consumer characteristics associated with the purchasing power of the Kazakhstan population, which in turn has a further impact on the consumer loyalty index, were selected as the primary study questions. As the central hypothesis, an assumption was made about the effects of the transformation of consumer behavior on the sales structure in the FMCG sector.

During the study, the consumer loyalty index was chosen as one of the fundamental indicators for interpreting the potential of the consumer environment. The consumer loyalty index assesses the overall purchasing power and studies private indicators.

At the initial stage of the study, to describe individual characteristics of the consumer profile, we conducted an electronic survey of the population of Kazakhstan aged 18 to 65 years. The minimum sample size was 400 people, and the confidence error was 4%. As part of this stage, the essential characteristics of Kazakhstan's citizens' consumer profile, which affect the consumer sentiment index, were determined.

A statistical study of Kazakhstan's main characteristics of the FMCG market was carried out based on the trade marketing tool Nielsen Holdings PLC. An analytical cut by the programmed tools was based on the results of the first, second, and third quarters 2022.

In the third stage of the study, an in-depth interview was conducted among marketing managers and specialists in demand acceleration of international and local companies. The sample consisted of 15 experts who commented on interpreting statistical sections and consumer survey results. Based on the study's results, modern consumer characteristics were described, the leading economic indicators of the FMCG market were derived, and individual market development trends were interpreted by collecting expert opinions.

Main provisions

The Nielsen Holdings PLC, Consumer Loyalty Index, is evaluated solely from the point of view of the sale of consumer goods. In this regard, the study examined the dynamics of this indicator, which most reflected consumer loyalty in the FMCG sector market. The selected indicator is calculated as a weighted average of the following factors:

1. Stability of the labor market;
2. Purchasing power of consumers;
3. Volatility in consumer demand.

The first and second factors within marketing are unmanageable, respectively, under the current conditions, the volatility of water demand by the impact of changing consumer behavior is an important area to study.

According to Nielsen Holdings PLC, the consumer loyalty index in the Republic of Kazakhstan has fluctuated slightly over the past few years [1].

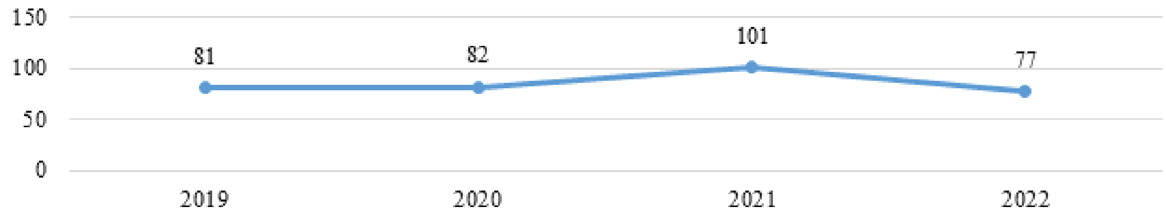

Figure 1 – Dynamics of the consumer loyalty index
in the Republic of Kazakhstan for the period from 2019 to 2022

Note: Compiled by the authors based on the source [1].

It is well known that fluctuations in the consumer loyalty index will further influence the change in consumer behavior. In this regard, field and desk research methods were selected for a detailed study of the difference in the current state of the FMCG market under changing consumer behavior.

Literature review

A detailed study of current market changes has become more critical in the context of increased market competition and a rapidly changing macro environment. Many scientific papers and analytical reports from consulting companies are devoted to studying the FMCG market's macroeconomic and microeconomic factors. Scientists pay special attention to the adaptation of marketing processes in conditions of market volatility.

Thus, a scientific article by scientists Nasiri G. Reza, Kalantari Mohammad and Karimi Behrooz were devoted to designing a pricing policy in an uncertain market with correlated demand. As a result of the study, scientists have developed a price-planning model per the proposed classification [2].

The adaptation of the assortment policy in the current conditions of the FMCG sector was described by the authors Xavier Andrade, Lus Guimarães and Gonçalo Figueira in the article «Product line selection of fast-moving consumer goods». In this paper, scientists explore the optimal set of products for consumer goods manufacturers. Using the inductive scenario planning methodology, the authors presented future consumer goods industry (FMCG) models in the context of the circular economy [3].

An analysis of the current FMCG market conditions and forecasting of future scenarios was considered by the authors Kuzmina Ksenija, Prendeville Sharon, Walker Dale, Charnley Fiona in the work «Future scenarios for fast-moving consumer goods in a circular economy» [4].

Increasing consumer loyalty and strategic market segmentation as separate areas of the consumer goods market were considered in the article «Consumer preference and market segmentation strategy in the fast-moving consumer goods industry: The case of women's disposable sanitary pads». The work was devoted to the effectiveness of the marketing strategy in a rapidly changing economy [5].

As a separate area of the FMCG market study, it is necessary to single out the development and evaluation of interaction business models with consumers. The scientists Sundström Malin and Sara Hjelm-Lidholm proposed models for increasing consumer loyalty in a rapidly changing consumer goods market in their scientific work «Re-positioning customer loyalty in a fast-moving consumer goods market» [6].

The formation of a multi-purpose decision-making model in the fast-growing consumer goods industry was described in the work of Sarangi Subrat, Chakraborty Abhishek, Konstantinos P. Triantis. In this paper, scientists proposed a design model for a multi-stage DND with various distribution channels, considering pricing and marketing goals with an uncertain demand [7].

In an article entitled «Circular business models for the fastmoving consumer goods industry: Desirability, feasibility, and viability» by the authors Nancy M.P. Bocken, Alisa Harsch and Ilka Weissbrod, the possibility of applying innovative closed-loop business models in practice was assessed using the example of the FMCG market [8].

Researchers Kolla Oliver and Plank Andreas investigated consumer behavior in the FMCG sector regarding repetitive brand loyalty. The result of the article «Product line selection of fast-moving consumer goods» was the interpretation of the interdependence of the stability of contextual marketing communications and repeated purchases of consumers [9].

Modern scientists are actively studying the mechanism of making purchases by consumers. For example, in the work «Main-format dominance in consumers' FMCG cross-format shopping patterns» by scientists Klein Andreas and Schmitz Gertrud, the features of cross-format combinations of consumer behavior in the FMCG market in the context of different product groups are considered [10].

The adjustment of the assortment policy and the withdrawal of non-marginal products from the sale in conditions of instability are also of particular importance. The procedure for the withdrawal of individual products within the framework of making operational and strategic decisions is described in the work of Pourhejazy Pourya, Sarkis Joseph, Zhu Qinghua – «Product deletion as an operational strategic decision: Exploring the sequential effect of prominent criteria on decision-making». Within the framework of scientific work, scientists offer several solutions for a more dynamic and in-depth study of the products' output order in commercial organizations [11].

Issues of multi-channel understanding of consumer behavior are also relevant areas for research. In 2022, scientists Kondo Fumiyo N. and Okubo Taishi published the results of a study in the article «Understanding multi-channel consumer behavior: A comparison between segmentations of multi-channel purchases by product category and overall products», which described the features of the sale of consumer products in various retail channels [12].

Several works have also been published within cluster studies of individual territories. In the position «The impact of customer-based brand equity on the operational performance of FMCG companies in India» by scientists Mohan Bijuna C. and Sequeira A.H. brand value metrics for manufacturers and retail companies in the FMCG market are evaluated. The study's results were correlation indicators between brand value and business results of the companies under study [13].

Another scientific article by Navarro Héctor Ángel Ramírez, Vieira José Geraldo Vidal, and Fransoo Jan C. «Understanding urban logistics and consumer behavior in São Paulo city» was aimed at analyzing urban logistics, comparing low and high-income areas in the city of São Paulo with considering local markets, consumer purchasing behavior and the process of product distribution [14].

Marketers are actively testing innovative technical methods to solve the market's current problems. Machine Learning in Predicting Demand for Fast-Moving Consumer Goods: An Exploratory Research was discussed in «Machine Learning in Predicting Demand for Fast-Moving Consumer Goods». This study presents the benefits of machine learning in predicting sales of products with a fast turnover and perishable products [15].

In order to test the effectiveness of alternative models in the FMCG sector, business models from related economic areas are also being studied in the scientific community. Thus, the article «Experimenting with sustainable business models in fast-moving consumer goods» describes the transition of FMCG market companies to sustainable business development models [16].

The number of presented objects and study subjects in modern works confirms the importance of researching the consumer goods market.

Results and discussion

Based on the goals and objectives of the scientific article, as well as taking into account topical issues in the field of studying consumer behavior discussed in the literature review, a three-stage study was organized and conducted. Based on the implementation of the first stage of the analysis following the first task of the article, specific characteristics of modern consumers in the Republic of Kazakhstan, the main moods, and current problems that affect shopping habits were identified.

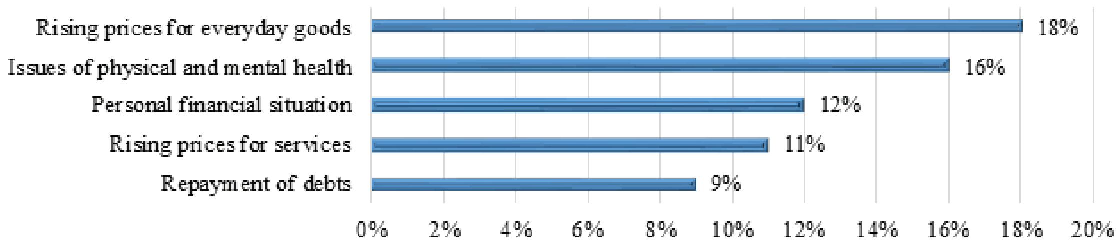

Figure 2 – Main factors concerning consumers in Kazakhstan

Note: Compiled by the authors based on the field study.

To identify the main consumer sentiment, through the interpretation of the survey results, the factors of public anxiety were identified, which, in turn, influenced consumer behavior trends.

As a result of evaluating the answers to the question concerning the current factors for concern, it was found that a significant number of respondents – 18% indicated an increase in prices. At the same time, 16% of respondents are concerned about issues of physical and mental condition. It was noted that the most tangible for consumers was the increase in food prices, especially for fresh meat, poultry, fish, meat products, fresh fruits, and vegetables. Every second consumer also noted price increases for hair care products, feminine hygiene products, and laundry detergents.

Respondents also named personal financial situation (12%), rising prices for services (11%), as well as repayment of private debts and loans (9%) as the most significant factors for concern. 34% of respondents named other reasons not included in the main list. According to experts, increasing prices for everyday products significantly impacts consumer behavior. First, the population's awareness of purchasing and brand commitment is expanding. Thus, many consumers began to pay more attention to the cost of products and purchase analogs at more attractive prices. In the coming years, this trend will continue, under the influence of which the structure of the FMCG market will change.

When answering the question about the commitment to preserving personal financial resources, more than 75% of the surveyed Kazakhstanis responded positively. The main areas for saving among the respondents were: the purchase of new shoes and clothes (67%), entertainment (60%), home/apartment renovation (45%), vacation (40%), purchase of additional services and services (25%). The transition to more accessible brands in the FMCG sector was also indicated by the respondents, with a response rate of 22%.

The results indicate that despite the trend of savings among respondents, the demand for consumer goods will not decrease; however, the market structure will undergo significant changes in the distribution of shares among distinct categories of goods and companies. In addition, experts note a trend towards an increase in the average check per customer; this change is pointed out in the third quarter of 2022 after the second wave of price increases. The described trend is explained by the artificial growth of the consumer basket due to lower prices for many consumer goods. It is expected that before the end of the year, the basket size will change slightly, in contrast to the structure of purchases.

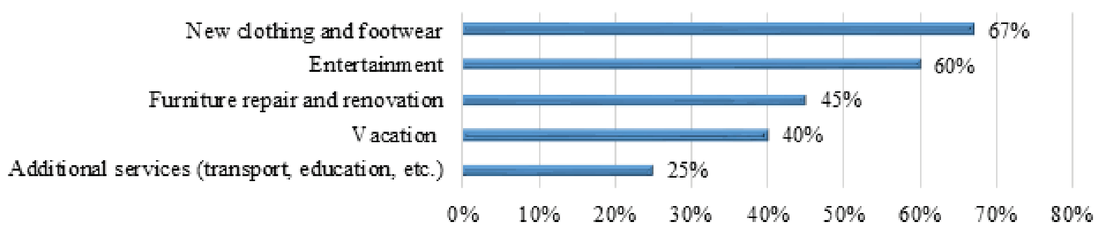

Figure 3 – Main items of expenditure affected by consumer savings

Note: Compiled by the authors based on the field study.

As part of the analytical slice of Nielsen data, additional characteristics of the consumer cost structure were derived (Figure 4). Based on an assessment of the consumer spending structure, it was revealed that the largest share of costs is occupied by consumer goods, about 2/3 of consumers spend from 10 to 50% of their total income on food and drinks. The smallest share on medicines, about 50% of consumers spend less than 50% of their income, on average less than 5% of the total revenue.

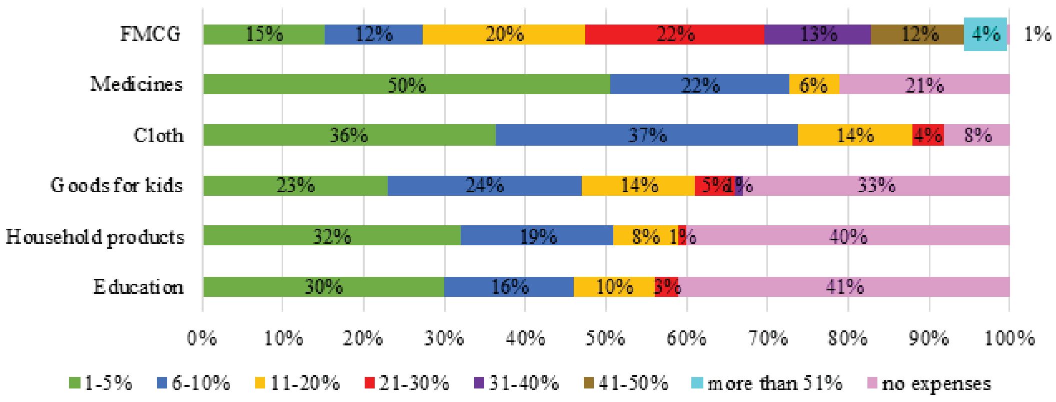

Figure 4 – The structure of consumer budget expenditures

Note: Compiled by the authors based on the source [17].

To assess the current structure of the FMCG market, the weighted average shares of individual market segments were calculated as part of solving the second task of the study. First, the market for consumer goods was considered from the standpoint of the importance of individual channels for the market. Under the size of outlets, the volume of monthly sales of products, and the average check, during the programming of statistical analysis, the following sales channels in the FMCG sector were identified:

1. Minimarkets;
2. Pharmacies;
3. Hypermarkets;
4. Supermarkets;
5. Other traditional shops (combined categories B and C).

As of 2022, 49% of the total turnover of the FMCG market was occupied by category B and C stores, supermarkets – 9.4%, and hypermarkets brought 36.2% of the turnover. Insignificant shares fell in pharmacies by 3% and impulse stores by 2.4% (Figure 5).

According to experts, this market structure, per the leading sales channels, will continue in the short term due to the growth of the traditional sales channel. The remote mode of operation since the COVID-2019 pandemic and the new consumer habits that have strengthened in the post-COVID period has led to the approval of the share of traditional trade in the total sales of the sector.

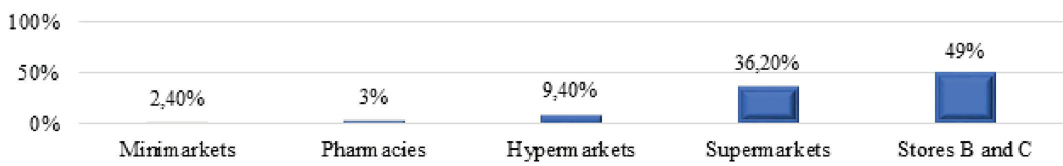

Figure 5 – Structure of the channel turnover of the FMCG market

Note: Compiled by the authors based on the source [17].

The market structure for consumer goods was also considered following the main categories of sales: confectionery, dairy products, soft drinks, personal hygiene products, and household goods for the home. First, the prominent companies selling products in this market were studied, considering the sector's general characteristics.

Figure 6 shows the TOP-10 manufacturing companies that occupy the top share in the sale of food and beverages in the FMCG market.

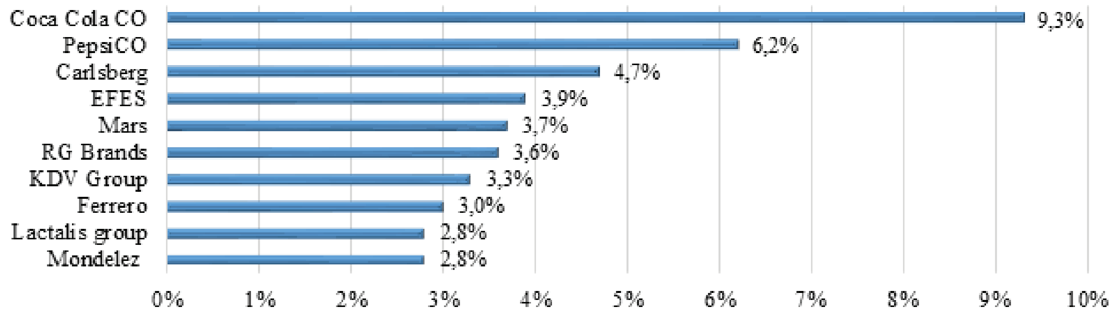

Figure 6 – Leading manufacturers of the FMCG market

Note: Compiled by the authors based on the source [17].

As of 2022, the following companies occupied the largest share in the FMCG market: Coca-Cola CO, which sells drinks – 9.3%; PepsiCo with a range of snacks, dairy products, and beverages – 6.2%; Carlsberg, which sells alcoholic and non-alcoholic products – 4.7%.

Based on the results of the expert interview, it is predicted that the primary shares between the leading companies may change shortly due to the difficulties with supply chains and raw materials that are widely observed in this sector. In addition, it is noted that a slight increase in the share of sales of products of local producers is expected.

TOP products for the FMCG market were MPK Gorilla 450 ml. (2.6%); CCI Coca-Cola 1 l. (1.9%); Mars Snickers milk bar, 50 gr. (0.8%); Rakhat Kazakh chocolate, 100 gr. (0.6%).

Further research was built based on the characteristics of individual categorical groups. The confectionery market must be considered one of the most highly turned FMCG categories. During the programming of the statistical analysis model for the study of this segment, the following products were included in the category: dragee, chocolate paste, desserts and cakes, chocolates, bar chocolate, cookies, and chocolate bars. As of 2022, the highest sales shares were occupied by: chocolate bars – 19% of the total turnover of the category, chocolate bars – 16%, and cookies – 15%. The main structural characteristics of the segment are shown in Figure 7.

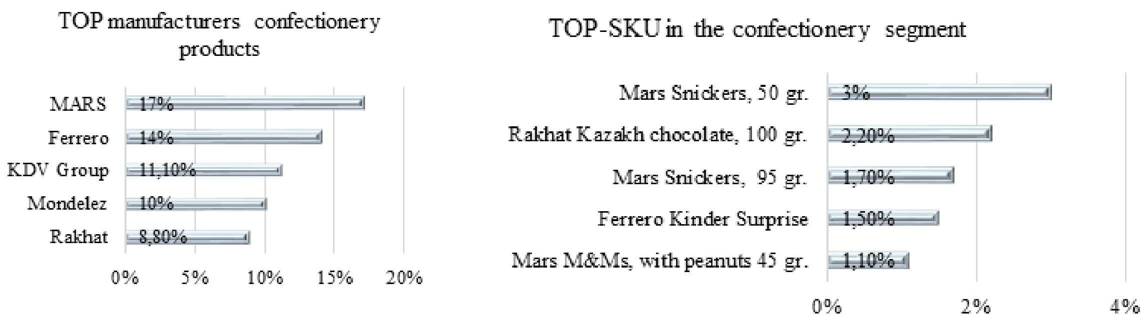

Figure 7 – Main characteristics of the FMCG confectionery segment

Note: Compiled by the authors based on the source [17].

The main share of the segment 61% is occupied by five leading companies: MARS (17%), Ferrero (14%), KDV Group (11.1%), Mondelez (10%), and the local company Rakhat (8.8%). The interviewed experts assume that the total volume of certain confectionery products may slightly decrease; however, the market structure will retain the former shares of large international manufacturers. The most popular SKUs are Snickers bar, 50 gr. – 3%, Kazakhstan chocolate 100 gr. – 2.2%, Snickers bar, 95 gr. – 1.7%, Kinder Surprise (standard) – 1.5%, and M & Ms, with peanuts 45 gr. – 1.1%.

The most stable demand characterizes the category of dairy products in the FMCG sector; the leading share of sales in the segment is milk – about 26% of the total turnover.

Other sub-categories occupied the following shares: fermented milk products – 17%, sour cream – 11%, and drinking yogurt – 10%. The rest of the segment comprises other dairy products such as yogurt in cups, glazed and non-glazed curds, and other dairy desserts. The central role in marketing dairy products is played by two channels: supermarkets, which account for about 48% of turnover, and category B and C stores (41.3% share).

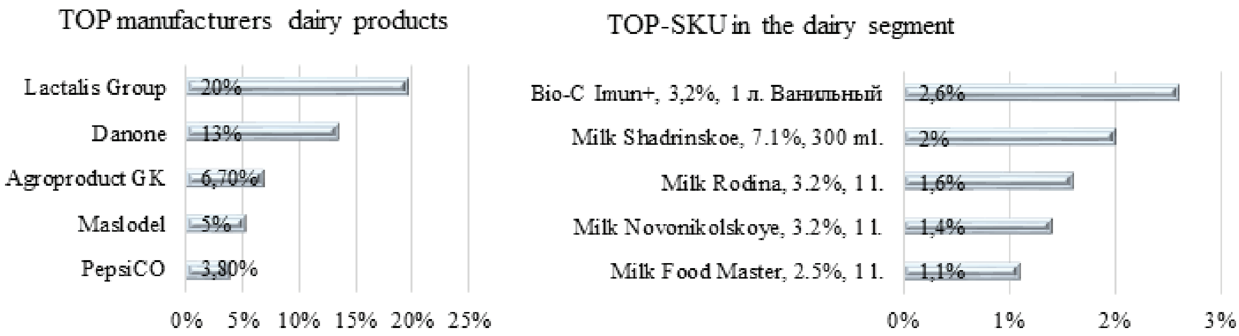

Figure 8 – The main characteristics of the dairy products segment of the FMCG market

Note: Compiled by the authors based on the source [17].

The list of the largest producers represented in the segment of dairy products was made up not only of international holdings such as Lactalis (20%), Danone (13%), and PepsiCo (3.8%) but also of local producers – Agroprodukt (6.7%), Maslodel (5%).

According to the results of the study period in 2022, the most popular product was the Bio-C milk drink with a share of 2.6%; also, among the most popular products, Shadrinskoye milk, 7.1% 300 ml, was singled out (2%). Pasteurized milk brands Rodina, Nikolskoye, and Food Master also demonstrated significant sales volumes.

Declines and fluctuations in sales in the segment of dairy products are not predicted since almost all manufacturers of goods base their factories in the Republic of Kazakhstan. According to experts, demand and consumer habits within this segment will be subject to market volatility with low probability.

The beverage category was evaluated by grouping the following segments: carbonated and non-carbonated, beer, beer, and energy drinks. This grouping was due to similar seasonality, sale frequency, and related purchases among the listed groups. Due to seasonal fluctuations, average indicators for the first, second, and third quarters of 2022 were used to characterize the segment.

In contrast to the previous categories, the most effective channel for the beverage segment is traditional stores, with a turnover share of 65.3% in 2022. The largest share of the group is occupied by soft drinks – 29%, beer – 23%, and energy drinks – 15%.

From the standpoint of subjective assessment, CCI Coca-Cola occupied the leading share of the beverage market – at 23.4%. The high sales of Coca-Cola ensured the stability of the company's position in various formats (the total brand share is 9.2%). The percentage of Carlsberg was 11.9%, EFES – 9.8%, PepsiCo (with soft drinks and energy drinks) – 6.8%, and Moscow Beer Company – 6.6%.

Among the TOP-5 most popular drinks on the market, two positions were occupied by energy drinks, Gorilla, 0.450 (5.3%) and Dizzy, 0.33 (2.5%) (Figure 9, p. 87). According to experts' forecasts, a slight decrease in the segment's turnover in the first half of 2023 is expected.

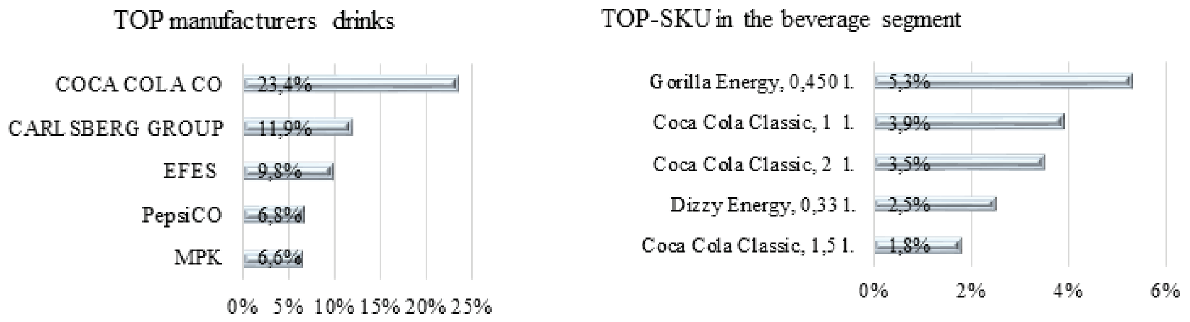

Figure 9 – Main characteristics of the beverage segment of the FMCG market

Note: Compiled by the authors based on the source [17].

Products of the nonfood segment were considered part of the distribution of all products into personal care products and household goods for the home.

The personal care segment included: hair products, facial products, hygiene products for children, oral hygiene products, and paper hygiene products.

The main sold category in the segment of personal care products was children's hygiene products (22%), feminine hygiene products (14%) were the second most popular category, and hair care products occupied a share of 14%. Generally, the three listed types form 50% of the segment's turnover.

In the production of hygiene products, almost 90% of the turnover falls on imported products; in this regard, this group of goods is considered the most susceptible to global market fluctuations.

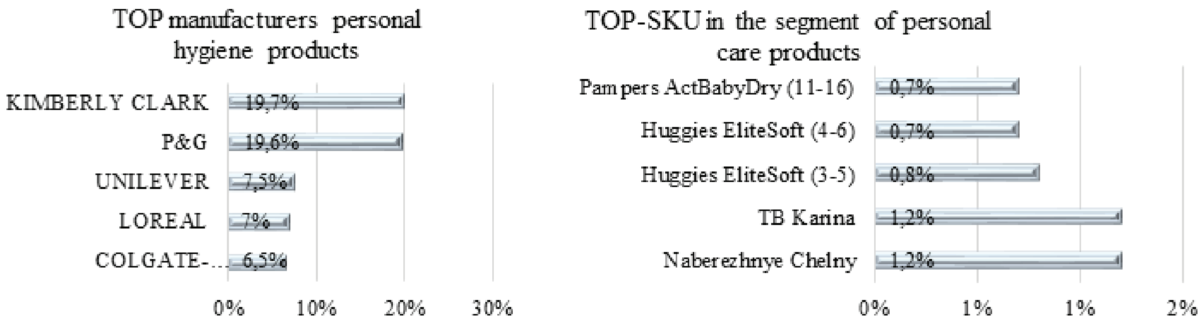

Figure 10 – Key Features of the FMCG Personal Care Segment

Note: Compiled by the authors based on the source [17].

Among manufacturers of hygiene products, KIMBERLY CLARK (19.7%) and P&G (19.6%) have the highest share with a significant margin from competitors.

Naberezhnye Chelny (1.2%) and Karina (1.2%) brands of hygienic paper products were singled out as the most popular types of goods, diapers from the Huggies brands (total share of 1.5% in the ranking) and Pampers also demonstrated a high sales volume (0.7%). Since the described segment is directly related to the conditions of the foreign manufacturing sector and the peculiarities of building supply chains, a wave increase in prices for personal care products is expected soon. Experts assume that price growth will occur in 3–4 waves, with a rise of 2–3%, and foreign economic factors influencing the sector in the strategic future cannot be predicted.

When forming a statistical cut for household goods, the following categories were considered: detergents and powders, cleaning products, air conditioning products, and air fresheners.

The main characteristics of the segment are shown in Figure 11 (p. 88). According to the breakdown of sales, the leading share of sales at 58% is made up of detergents and powders, which is determined mainly by the high cost of the category products relative to other products in the segment. Detergents and cleaning products also account for 11% of the segment's turnover.

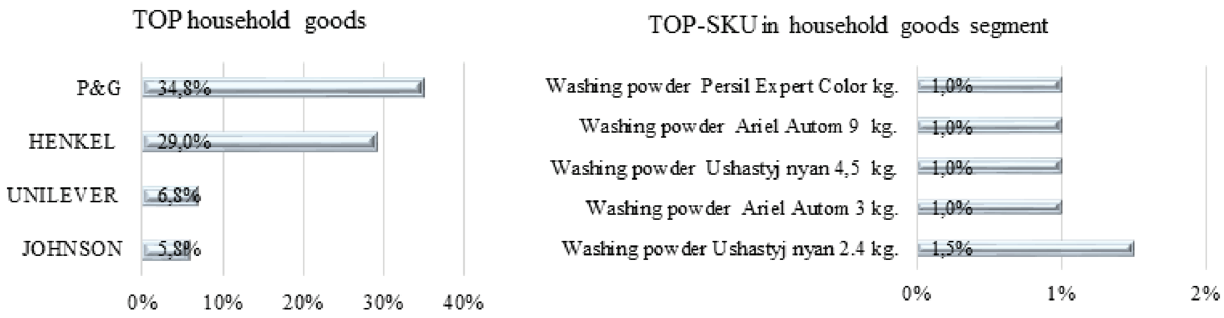

Figure 11 – Main Features of the FMCG Household Goods Segment

Note: Compiled by the authors based on the source [17].

P&G companies occupy the highest share in the segment – 34.8% and HENKEL – 29%. These manufacturers control 64% of the FMCG market in household products. Washing powders of various brands were identified as the TOP-5 most popular products of the segment. The total share of the Ariel brand in this list was 2%, Ushastyj Nyan 1.5%.

Trends typical for the segment of personal care products are also relevant for household products. Experts also expect a further wave increase in this market.

Conclusion

As a result of a three-stage study, the main characteristics of the modern consumer of the FMCG market were identified, and current trends in various sectors of the FMCG market were identified. Even though in market volatility conditions, consumers tend to maintain the direction of saving (75% of the surveyed consumers indicated this factor), when analyzing the answers to the question about cost reduction items, the respondents named none of the segments of the FMCG sector. Based on this, there is a stable volume of sales of consumer goods, as well as an increase in the average bill of consumers due to a wave price increase shortly. In addition, the degree of awareness of purchases and commitment to brands is increasing among the population. Thus, it was determined that many consumers began to pay more attention to the cost of products and purchase analogs at more attractive prices. This indicates a change in the market structure in the context of individual sub-categories and brands in the next few years.

It is expected that the structures of the established FMCG segments will change, including changes in the share of sales of individual brands, a decrease in the volume of sales of non-essential products, and a review of consumer commitment to certain brands. It should also be noted that in each of the studied segments (confectionery, dairy products, beverages, personal care products, and household goods), changes will occur, considering the specifics of the product being sold and the level of competition in the market.

For example, it is assumed that the total volume of certain confectionery products and beverages may decrease slightly while demand for the dairy product categories will remain stable. According to experts, the household and personal goods market will be subject to price increases, impacting the category’s internal structure.

The results confirmed that the transformation of consumer behavior would impact the market of daily consumption goods (FMCG) of the Republic of Kazakhstan from a structural point of view, confirming the research hypothesis.

The study results confirm the increasing importance of analyzing and modeling consumer behavior and customer loyalty for companies selling this product. The described factors determine the extent of forming separate demand acceleration structures for FMCG companies, allowing them to receive up-to-date information on consumer behavior trends and take timely tactical actions in marketing.

The study results can be further used by Kazakhstani FMCG and retail companies when building sales strategies, studying the behavior of a modern consumer, forming a trade marketing policy, and making tactical decisions. These studies may be relevant for companies that still need their analytical tools.

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ТҰТЫНУШЫЛЫҚ АДАЛДЫҚ ДИНАМИКАСЫН ЕСКЕРЕ ОТЫРЫП, ҚАЗАҚСТАН РЕСПУБЛИКАСЫНДАҒЫ КҮНДЕЛІКТІ СҰРАНЫСҚА ИЕ ТАУАРЛАР НАРЫҒЫН ТАЛДАУ

Аңдатпа

Жаңа геосаяси, экономикалық және әлеуметтік жағдайлардың қалыптасуы нәтижесінде тұтыну тауарлары нарығы айтарлықтай өзгерістерге әкелетін жоғары құбылмалылыққа ұшырауда. Дегенмен, трансформация тұтынушылардың мінез-құлқына ғана емес, сонымен қатар FMCG секторындағы тауарларды сататын компаниялардың маркетингтік саясатына да қатысты. Ғылыми мақалада Қазақстан Республикасының FMCG нарығының ағымдағы көрсеткіштері ұсынылды. Сауалнама деректерін интерпретациялау нәтижесінде тұтынушылардың экономикалық профиліндегі өзгерістердің нәтижелері берілген. Зерттеудің мақсаты – тұтынушылардың мінез-құлқының өзгеруінің Қазақстан Республикасының тұтыну тауарлары (FMCG) нарығына әсерін зерттеу. Зерттеу әдістері ретінде: статистикалық талдау, сауалнама, тереңдетілген сұхбат әдістері қолданылды. Зерттеу нәтижесінде нарықтың экономикалық сипаттамалары 2022 жылдың үш тоқсанындағы статистикалық қиманың нәтижелері бойынша көрсетілді. Жүргізілген сараптамалық сұхбат деректері негізінде нарықты одан әрі трансформациялау болжамы және жеке тенденцияларды түсіндіру қалыптасты. Үш кезеңдік зерттеу нәтижесінде FMCG нарығының көлемі мен құрылымы бойынша өзекті деректер алынды, қазіргі заманғы тұтынушылардың жекелеген сипаттамалары сипатталды, сондай-ақ Қазақстан Республикасындағы тұтынушылық адалдық көрсеткіштерін жақсарту мүмкіндіктері бағаланды. Зерттеу нәтижелерін қазақстандық FMCG және бөлшек сауда компаниялары сату стратегияларын құру, заманауи тұтынушының мінез-құлқын зерттеу, сондай-ақ сату саясатын қалыптастыру және тактикалық шешімдер қабылдау кезінде пайдалана алады. Әсіресе, бұл зерттеулер өздерінің аналитикалық құралдары жоқ компаниялар үшін өзекті болуы мүмкін.

Тірек сөздер: күнделікті тұтыну тауарлары, нарық құрылымы, экономикалық профиль, адалдық индексі, сараптамалық сұхбат, тұтынушылардың сауалнамасы.

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АНАЛИЗ РЫНКА ТОВАРОВ ПОВСЕДНЕВНОГО СПРОСА В РЕСПУБЛИКЕ КАЗАХСТАН С УЧЕТОМ ДИНАМИКИ ПОТРЕБИТЕЛЬСКОЙ ЛОЯЛЬНОСТИ

Аннотация

В результате формирования новых геополитических, экономических и социальных условий рынок товаров широкого потребления претерпевает высокую волатильность, влекущую его значительные изменения. При этом трансформация касается не только поведения потребителей, но и сбытовой политики компаний, реализующих товары FMCG-сектора. В научной статье приведены актуальные показатели рынка FMCG Республики Казахстан. Результаты изменения отдельных поведенческих характеристик потребителей представлены в результате интерпретации данных проведенного опроса. Цель исследования – изучение влияния трансформации потребительского поведения на рынок товаров повседневного потребления (FMCG) Республики Казахстан. В качестве методов исследования использованы статистический анализ, опрос, глубинное интервью. Характеристики рынка были отражены по результатам статистического среза трех кварталов 2022 г. Прогноз дальнейшей трансформации рынка и объяснение отдельных тенденций сформированы на основе данных проведенного экспертного интервью. В результате трехэтапного исследования получены актуальные данные по объему и структуре рынка FMCG, описаны отдельные характеристики современных потребителей, а также оценены возможности улучшения показателей потребительской лояльности в Республике Казахстан. Результаты исследования могут быть использованы казахстанскими FMCG и розничными компаниями при построении стратегий сбыта, изучении поведения современного потребителя, а также при формировании политики сбыта и принятии тактических решений. В особенности данные исследования могут быть актуальны для компаний, не имеющих собственных аналитических инструментов.

Ключевые слова: товары повседневного спроса, структура рынка, экономический профиль, индекс лояльности, экспертное интервью, опрос потребителей.