



CIVIL AVIATION SYSTEM IN KAZAKHSTAN: CURRENT STATE AND DEVELOPMENT PROSPECTS

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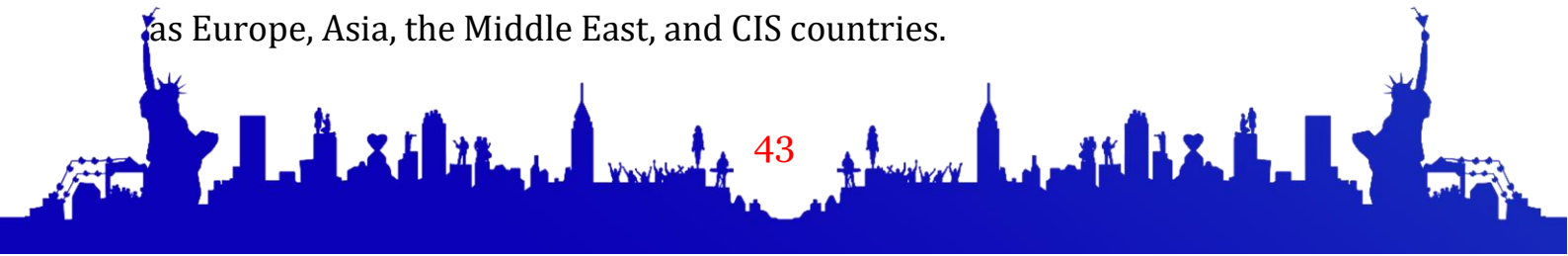
Introduction

Air transport plays a significant role in the transport infrastructure of the Republic of Kazakhstan and has experienced considerable development in recent years. Currently, the country has approximately 19 active airports that serve both domestic and international passenger traffic. Almaty International Airport is the busiest airport in Kazakhstan, acting as a major hub for both domestic and international flights. In 2024, the airport handled 11.4 million passengers, the highest figure in the country, and it also serves as an important regional air transport hub. Nursultan Nazarbayev International Airport in Astana is another key player in the market, with approximately 8.3 million passengers served in 2024. This airport is a crucial connection point linking Astana with Central Asia and Europe.

Other important airports in the republic include Shymkent, Aktau, Atyrau, Kostanay, Oskemen, Semey, Pavlodar, Petropavl, and Turkistan. These airports provide both domestic and international services, ensuring comprehensive transport connectivity across regions.

Recent statistics indicate significant growth in Kazakhstan's air transport sector. By the end of the first 10 months of 2025, airports served a total of 26.6 million passengers, representing an increase of approximately 8% compared to 2024. Additionally, 13.1 million passengers were transported on domestic routes. This growth demonstrates the effectiveness of aviation development and infrastructure modernization in the country.

The network of air routes is also expanding. As of 2025, there are nearly 60 domestic routes operating with 821 weekly flights. The international network covers 131 routes across 30 countries, with more than 600 weekly flights. These routes ensure continuous air connectivity between Kazakhstan and regions such as Europe, Asia, the Middle East, and CIS countries.





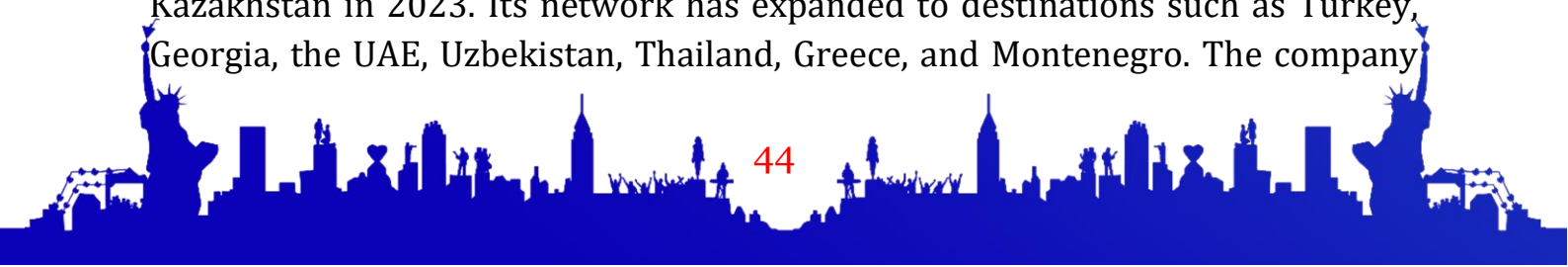
In 2025, several new direct international routes were introduced. For example, new routes from Astana and Shymkent airports to Germany, Turkey, China, South Korea, Georgia, and other countries were launched. Additionally, regional cooperation within Central Asia has been strengthened through routes such as Astana–Samarkand and Almaty–Osh. Air connections between Kazakhstan and Uzbekistan are also expanding steadily, with increased frequencies on routes such as Almaty–Tashkent and Astana–Tashkent. This development enhances transport integration between the two countries.

Furthermore, to improve airport infrastructure, construction of three new airports began in 2025 in Zaisan, Katon-Karagai, and Kendirli. These investments aim to enhance regional connectivity, promote domestic tourism, and stimulate economic activity. In addition, new terminal complexes have been built at Almaty, Shymkent, and Kyzylorda airports, significantly increasing their passenger capacity. For instance, the new terminal at Almaty Airport has increased its annual capacity to 14 million passengers, strengthening its competitiveness as the country’s largest aviation hub.



Air Astana Group remains one of the leading aviation groups in Central Asia and the Caucasus and holds a dominant position in Kazakhstan’s domestic market, with a market share of approximately 67%. FlyArystan, launched in 2019, has shown significant growth and currently holds around 37% of the market, highlighting the popularity of low-cost air travel and its role in making air travel more accessible to the population.

The group has leveraged its leading position to connect Central Asia with the rest of the world, achieving a 45% market share in international routes from Kazakhstan in 2023. Its network has expanded to destinations such as Turkey, Georgia, the UAE, Uzbekistan, Thailand, Greece, and Montenegro. The company





has shifted its focus toward international markets, reducing reliance on Russia and Ukraine. Indicators such as Available Seat Kilometers (ASK) and Revenue Passenger Kilometers (RPK) have increased, reflecting growing demand. FlyArystan's low-cost model has played a key role in boosting regional air travel demand.

The airline group is widely recognized for its high service quality, receiving awards such as "Best Airline in Central Asia and CIS" and "Best Service in Central Asia and CIS." FlyArystan has also been named the "Best Low-Cost Airline in Central Asia and CIS" and has received a 4-star rating from Skytrax. Customer satisfaction indicators, including Net Promoter Score (NPS) and Customer Satisfaction (CSAT), improved in 2023 compared to 2022. FlyArystan also introduced new initiatives to enhance customer experience, including onboard entertainment streaming and self-service check-in kiosks at domestic airports.

One of the key strengths of Air Astana is that it maintained financial, managerial, and operational independence during the COVID-19 pandemic without government subsidies or shareholder support. Initially established as a domestic carrier, the airline expanded its operations significantly, operating 48 international and 43 domestic routes by 2023. These routes cover Central Asia, the Caucasus, and previously Siberian regions, as part of its "extended home market strategy."

Despite early challenges, including issues with planned radar contracts, Air Astana has demonstrated high operational efficiency. In 2021, it received a "5-Star COVID-19 Airline Safety Rating" from Skytrax. In February 2024, the airline reached a major milestone by completing an Initial Public Offering (IPO) and listing its shares on the London, Astana, and Kazakhstan stock exchanges.

The company employs over 6,000 staff, primarily based in Kazakhstan, with additional personnel in international offices. Its workforce includes 460 pilots, 64 of whom are foreign nationals, all holding EASA (European Union Aviation Safety Agency) licenses.

Air Astana's main competitive advantage lies in its position as the largest airline in Central Asia and the Caucasus. As of 2023, it holds a 69% share of the domestic market and around 40% in regional routes.

Conclusion

In recent years, Kazakhstan's air transport system has developed rapidly and has become a key factor in the country's economic growth and regional integration. With 19 active airports, Kazakhstan efficiently supports both domestic and international passenger traffic, strengthening its position as one of





the major aviation hubs in Central Asia. In particular, Almaty and Astana international airports play a leading role in terms of passenger traffic, geographic location, and number of flights, making them strategically important in connecting Europe and Asia.

Statistical data show a steady increase in demand for air transport. The continuous growth in passenger numbers, expansion of domestic and international routes, and ongoing investments in airport infrastructure confirm the effectiveness of development policies. The construction of new airports and modernization of existing terminals enhance regional connectivity, support tourism growth, and stimulate economic activity.

At the same time, Air Astana Group and its subsidiary FlyArystan play a decisive role in the aviation market. Their high market share, extensive international network, and service quality have contributed to the formation of a competitive aviation environment in the region. Notably, Air Astana's financial resilience during the pandemic and its successful IPO demonstrate a stable and effective management model.

Overall, the development of infrastructure, expansion of airline operations, and strengthening of international cooperation are increasing Kazakhstan's transport capacity. This, in turn, reinforces the country's position as a leading transit and aviation hub in Central Asia.

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