

News Release

P105/22e
January 5, 2022

New challenges put a sharper point on popularity of automotive color

- **Total vehicle production was lower, shifting the popularity of certain colors**
- **Blue and red are having a moment in the sun**
- **Despite the shift in colors, white, black, silver, and gray follow a familiar pattern, coating the majority of the vehicles produced**

In 2021, the automotive industry faced new challenges that it had never faced before. The total number of vehicles built on the world's assembly lines in 2020 and 2021 was significantly lower than the years before. That put a sharper point on the popularity of certain color spaces in the BASF Color Report 2021 for Automotive OEM Coatings, while knocking some perennial favorites down a few points.

The achromatic colors – white, black, gray, and silver – are still the most popular. They have classic, timeless beauty, and a connection to both the environment and high technology. But some cracks are showing in their armor as new color spaces emerge.

As predicted by BASF's designers years ago, blue is having a moment in the sun. Red is also rising – taking market share from the achromatic colors in many parts of the world. Even though the numbers are smaller, green and beige still show up in the data, and the colors aren't the typical shades you might expect.

EMEA – Greater diversity of chromatic colors and shades

The share of chromatic colors in Europe, the Middle East, and Africa (EMEA) is now

over 27% and rising – the highest it's been in two decades.

Blue is driving the trend among the chromatics. There are currently nearly 180 shades of blue from sky blue to midnight blue that are elegant, fresh, and young, and appear on all body types in all segments. Red is in second place, far behind blue, accompanied by a fair share of shades of green.

For the achromatic colors, white is still the most popular, but gray is catching up. Gray has several options, with effects and textures that multiply its presence. Gray's 160 shades range from elegant, dark, sparkling colors to light and sporty solid colors.

"Colors designed for EMEA use familiar color positions, but change them with the help of new effects, subtle color gradients, or a specific sparkle behavior. They make the chromatics stand out as bold expressions of individuality and sportiness, gaining popularity each year," said Mark Gutjahr, head of Automotive Color Design, EMEA.

Asia Pacific – Leading the way in global color diversity

White may still be the most popular color in Asia Pacific (AP), but its popularity is starting to slip. Black and gray continue to improve, maintaining a four-year trend that is changing the presence of white vehicles on the road. A full 79% of new vehicles produced in AP were coated with achromatic colors in 2021.

The popularity of chromatic colors is stable, with some individual color spaces adjusting a few points up or down. Blue – the number one chromatic color – is up, mirroring global data from other regions. It took some share from red, which went down. Brown and gold show up in substantial numbers, while beige, orange, yellow, green and violet hang on with about 1% each.

"AP has the largest volume of automotive production in the world, and reflects the highest diversity of color, compared to other regions," said Chiharu Matsuhara, head of Automotive Design for AP. "Along with the surge in blue, the family of green colors increased. From teal to khaki to olive, these aren't the usual greens, especially in SUVs."

North America – Color preferences changing rapidly in the Americas

Blue appears to be moving on for North America. Its share is down 4% when compared to last year. That would put the preference for blue back to 2017 levels.

Achromatic colors surged, including white, which increased in North America while declining globally, but not silver or gray, which are both down. Among the chromatic colors, red edged up 1%. Red and blue are now tied as the most popular chromatic colors.

Raw material shortages in 2021 forced automakers to make difficult choices while allocating scarce resources. That seemed to favor the larger, more popular platforms in the midst of the downturn.

“North America appears to change direction more quickly. With demand high and supply trending lower, buyers could be forced into making more pragmatic choices and fewer emotional choices. Consumers have quickly shifted to more familiar shades in the achromatic space,” said Paul Czornij, head of Automotive Design for the Americas.

South America – Following the global direction

Blue is enjoying a global surge in popularity. In South America, blue increased by 3% in 2021, taking some of that market share from red. While car buyers in the region tend to be more conservative, some new shades are catching buyers’ eyes.

Automotive designers often look 3-4 model years ahead when developing colors. This is playing out as predicted, as South America tends to be slower to adopt color direction than other regions.

“With an increase that large, blue is really establishing itself in South America. From sky blue to dark blue, more car buyers are moving into this color family. We’re using some beautiful effects and pigments, especially metallics, that advance this important design space,” said Marcos Fernandes, Director BASF Coatings, South America.

The BASF Color Report for Automotive OEM Coatings is a data analysis from BASF's Coatings division based on global automotive production and paint application to light vehicles in 2021.

About BASF's Coatings division

The Coatings division of BASF is a global expert in the development, production and marketing of innovative and sustainable automotive OEM and refinish coatings, decorative paints as well as

applied surface treatments for metal, plastic and glass substrates in a wide range of industries. The portfolio is completed by the “Innovation Beyond Paint” program which aims at developing new markets and businesses. We create advanced performance solutions and drive performance, design and new applications to meet our partners’ needs all over the world. BASF shares skills, knowledge and resources of interdisciplinary and global teams for the benefit of customers by operating a collaborative network of sites in Europe, North America, South America and Asia Pacific. In 2020, the Coatings division achieved global sales of about €3.1 billion.

Solutions beyond your imagination – Coatings by BASF. For more information about the Coatings division of BASF and its products, visit www.basf-coatings.com.

About BASF

At BASF, we create chemistry for a sustainable future. We combine economic success with environmental protection and social responsibility. More than 110,000 employees in the BASF Group contribute to the success of our customers in nearly all sectors and almost every country in the world. Our portfolio is organized into six segments: Chemicals, Materials, Industrial Solutions, Surface Technologies, Nutrition & Care and Agricultural Solutions. BASF generated sales of €59 billion in 2020. BASF shares are traded on the stock exchange in Frankfurt (BAS) and as American Depositary Receipts (BASFY) in the U.S. Further information at www.basf.com.