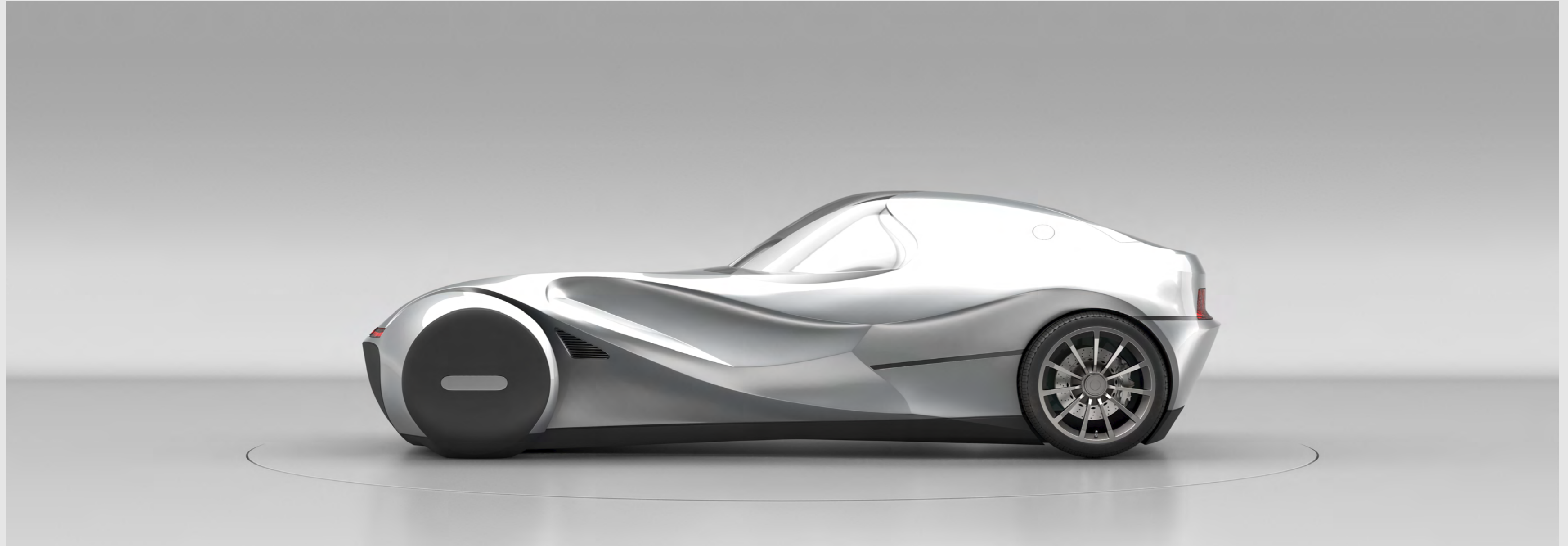


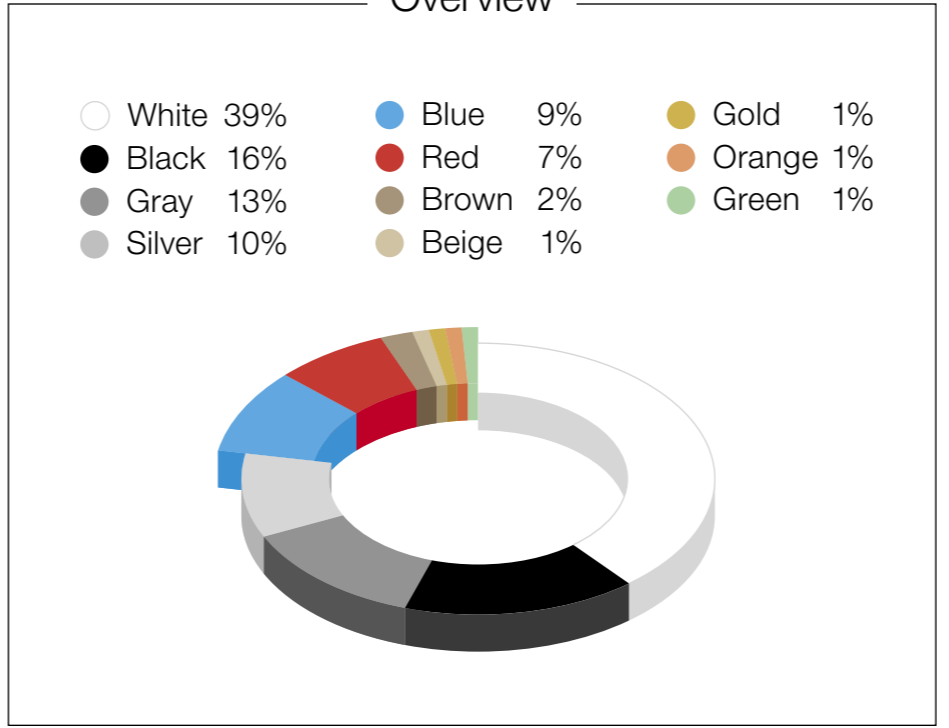
# BASF Color Report 2019 for Automotive OEM Coatings



# Popularity of white shows slight decrease

## Global

### Overview



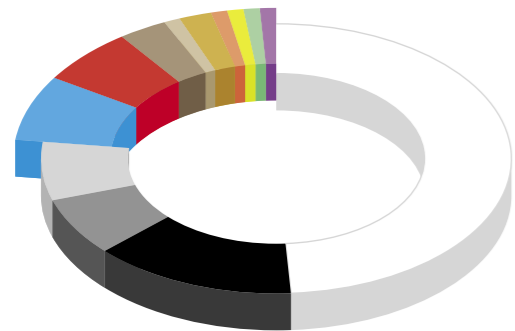
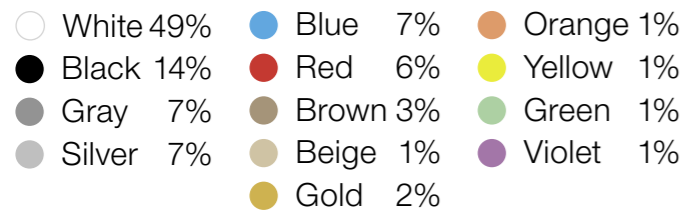
The global overview on color popularity 2019 shows a rather stable share of chromatic and achromatic colors compared to the previous year: The achromatic colors – white, black, silver and gray – dominate the market accounting for 78%. Nevertheless, small shifts within the achromatic segment can be observed: With a share of 39% white is still the No. 1 color but loses share. Black and gray remain stable while silver slightly gains popularity.

Analyzing the chromatic segment shows that blue increases its share up to 9% and almost catches up with silver. The share of further chromatic colors such as red, brown, green and orange is similar compared to the one in 2018.

# Color preferences vary in the regions

## Asia Pacific

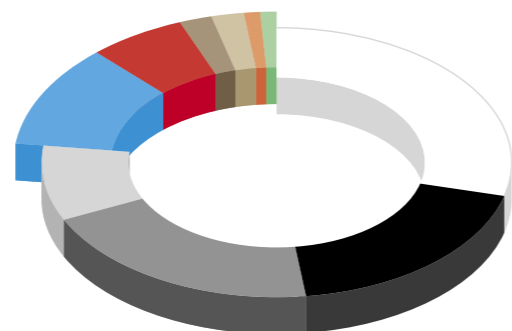
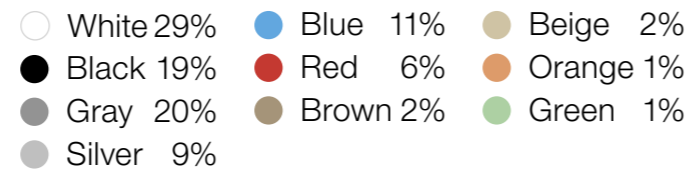
Overview



The overall color share is unchanged with 77% achromatic colors. White is still dominant and stays at 49%. Red, which was in the top position for chromatic colors in past years, is replaced by blue which reached 7% share in 2019.

## EMEA

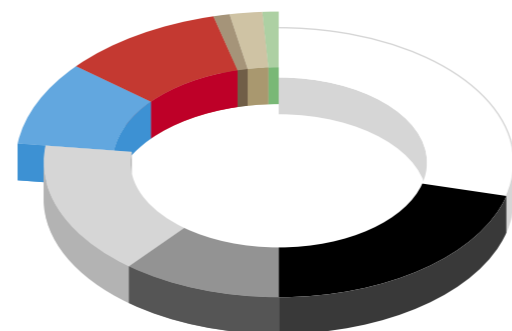
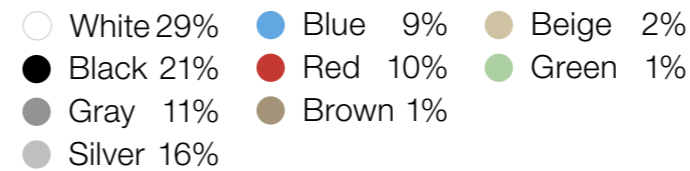
Overview



White loses share again and continues its downswing. Nevertheless, it still represents the most favorite color. Blue and gray continue their road of success. Strengthening their position in the overall market, they also stand out with a huge color variety. Winner in 2019 is beige, emerging significantly for the first time.

## North America

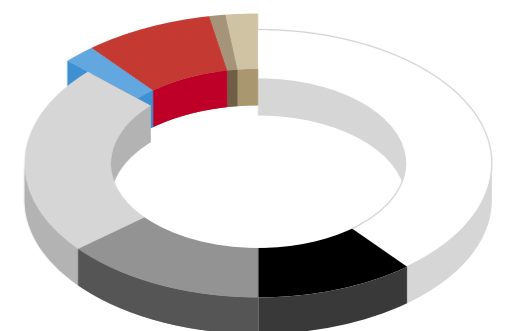
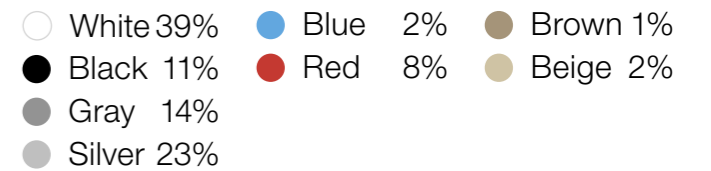
Overview



Drivers are choosing crisp, clean whites for new vehicles with higher technology. Achromatic colors dominate the market, with most vehicles likely to be white, black, silver, or gray. If a vehicle is not achromatic, it is most likely red, which just edges out blue.

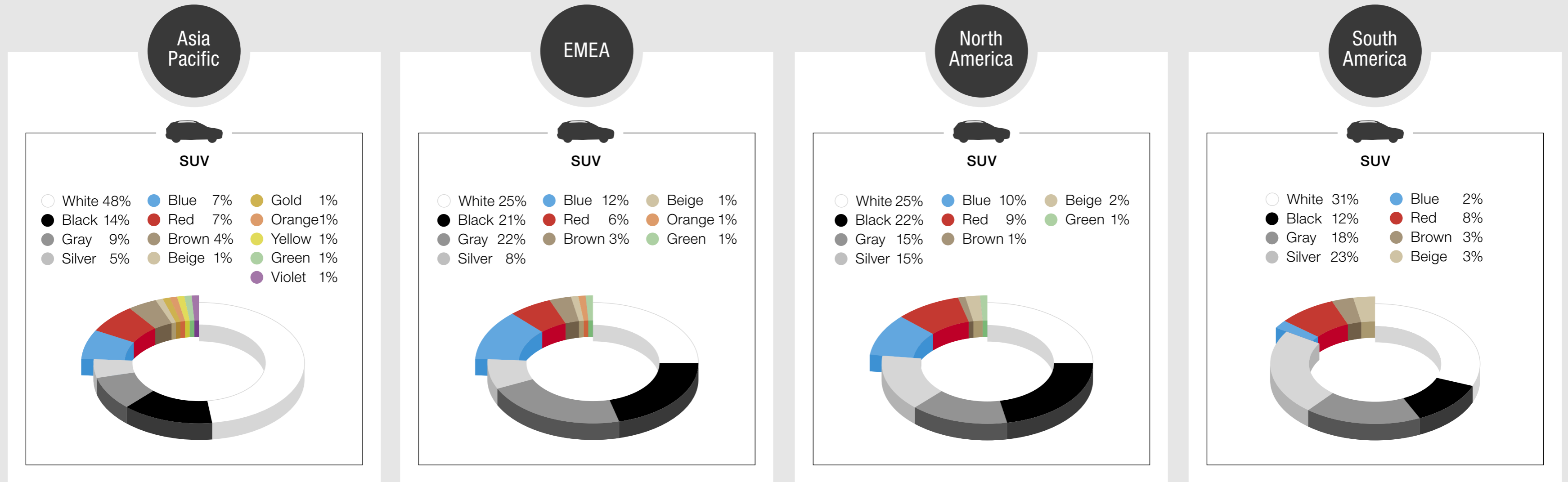
## South America

Overview



The South American market is focused on bright achromatics, like white and silver. The share of red in South America is larger than in Asia Pacific and EMEA. Drivers show their passion for brilliant color and individuality by choosing red.

# Success story of SUVs continues – white loses impact



The market share of white is on top, at 48%, followed by black, at 14%, which is consistent with AP overall. Gray is popular for SUVs and getting attention with diverse effects on urban SUVs. Blue and red are tied at 7%. Blue increases in saturated and light clean tones.

SUVs comprise a huge variety of different models, ranging from urban mini-SUVs to large and luxurious people-haulers. Due to this diversity and its unbroken trendiness, SUVs represent the largest vehicle segment. Gray gains popularity and is especially strong compared to other segments. Blue also increases its share while white continues to decline. Chromatic colors are in favor for smaller SUVs, while larger models tend to be painted in darker shades.

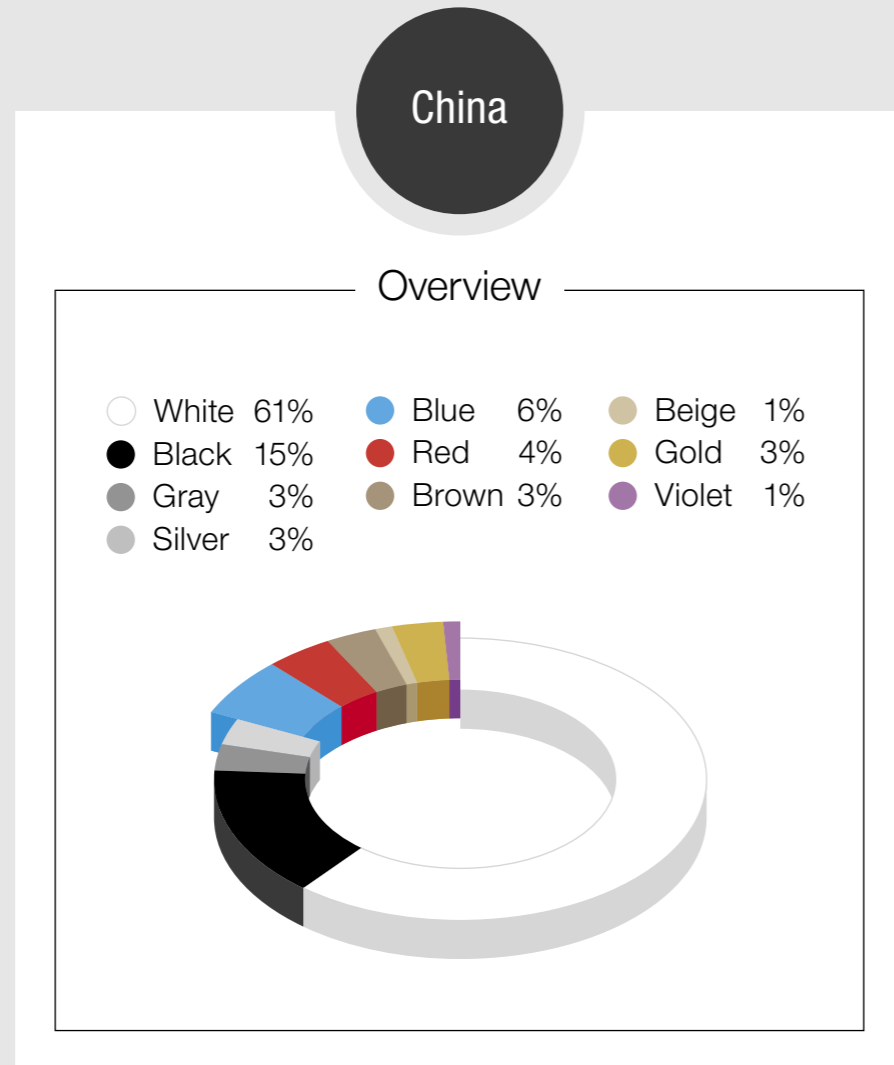
With many North American automakers exiting the sedan market, crossovers and SUVs – and their luxury counterparts – dominate the market. About 77% of the CUV/SUV market in North America ends up with an achromatic color of white, black, silver, or gray. That’s especially true for the largest SUVs. Brighter chromatic colors like red, blue, or brown that look great on a small crossover won’t always look good on a larger SUV.

The production of SUVs is increasing in South America. Although white leads in volume, at 31%, it is less representative when compared to the total market. Silver, at 23%, and gray, at 18%, are the most popular choices for SUVs, and combined, the two beat white. Black, at 12%, and red, at 8%, are also preferred. Brown and beige together account for 6% of the market, outperforming blue.

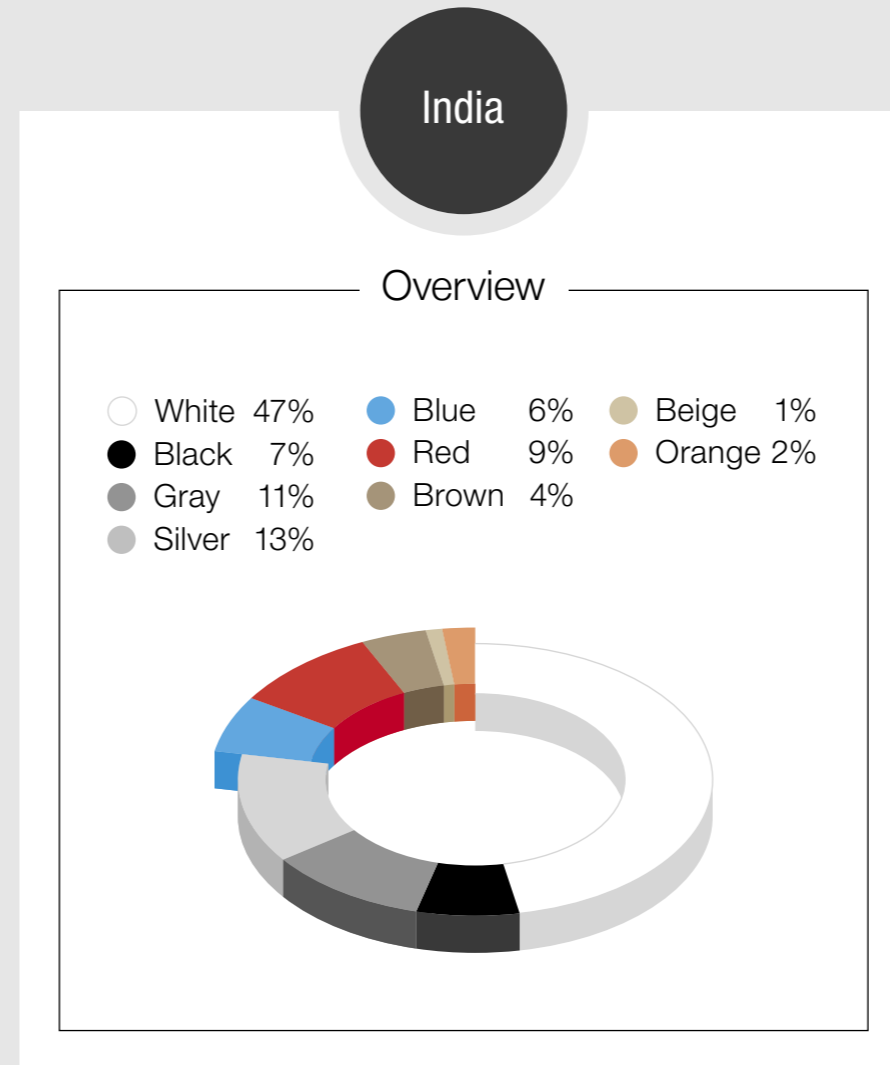


# Diversity of colors and shades

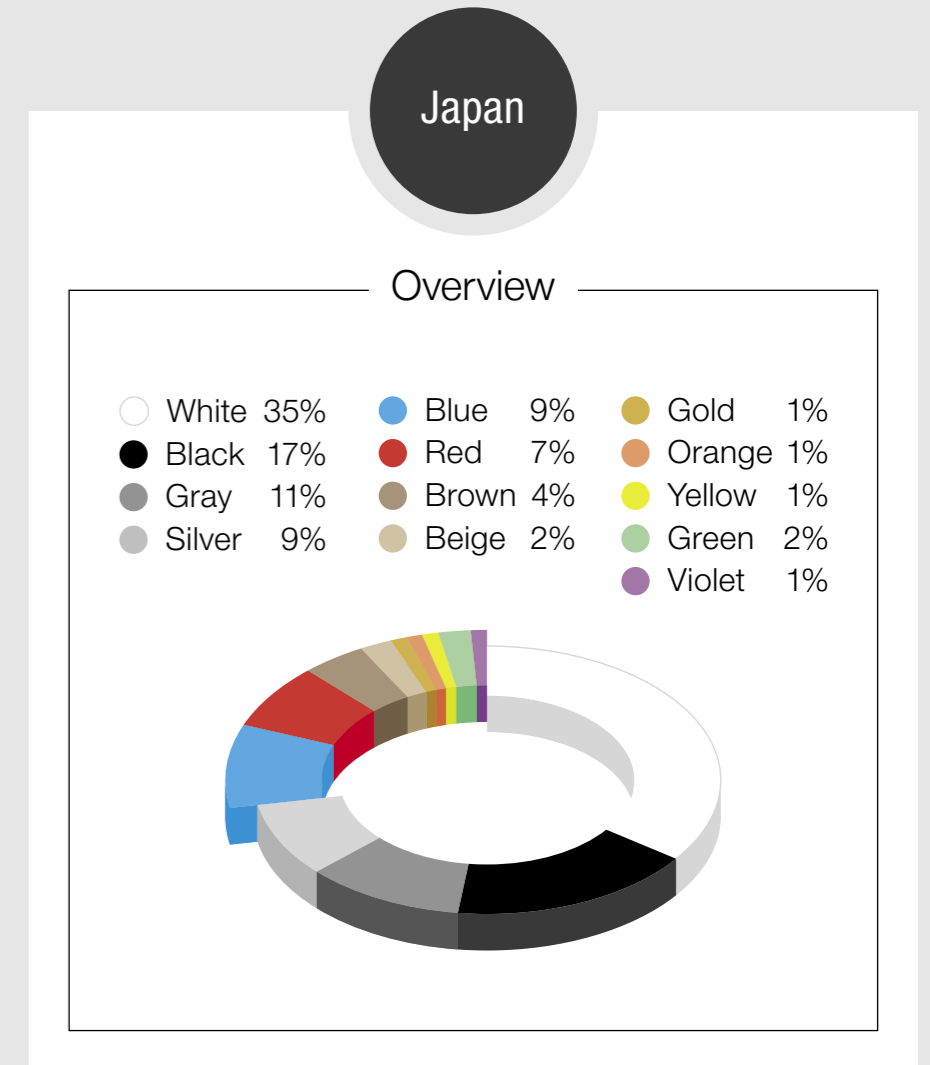
The analysis of the three focus countries in Asia Pacific show similarities like the high share of white in all three countries. The chromatic colors however show specific characteristics in Japan, China and India.



Achromatic color ratio is stable at 82%, the highest among the three countries. White's dominance, at 61%, is stable as well. In chromatic colors, red has been replaced by blue at 6%, especially in the most popular segment – SUVs.



White is popular and stable for its ability to reflect heat in the sunshine. White makes up 47% of the market, followed by silver at 13%, and gray at 11%. Red is top in chromatic colors, with 9%. It is reflected by B segment vehicles, which are the highest volume in India and mainly for private use.



Japan has the most colorful tendency among the three countries. The Blue share is high, at 9%, followed by red at 7% and many other shades. Green and high chroma yellow get high attention as fresh individual colors. Many different shades and tones are seen in chroma color areas. Black increases, due to an diversifying range of effect available for black.

## Trend competence and innovative color concepts

BASF's Coatings division has an excellent understanding of what is trending in materials and colors, and uses this to predict, which colors will play a key role in the future automotive market. Every year, the Coatings division's designers create Automotive Color Trends, an innovating collection of new colors based off extensive research and in-depth analysis of global trends and cultural shifts that will influence automotive colors 3 to 5 years into the future. Together with experienced colleagues in the color lab, the Coatings division's know-how comprises not only the art of designing innovative and creative colors, but also the knowledge required to translate them into applicable paints.



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