

News Release

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Shifting achromatic colors: white is still king, but black gained in popularity, taking market share

- **The old, standard automotive color wheel is changing**
- **White, black, gray, and silver are still dominant for non-commercial light vehicles**
- **Chromatic colors remain stable**

In trend research released last fall, BASF stated that the traditional automotive color wheel was going through a transformation. The recently released 2023 BASF Color Report for Automotive OEM Coatings provides hard data to back up that trend.

Achromatic colors, which have always formed the foundation of automotive color, are experiencing a significant shift. While white continues to hold its position as the most popular color for light passenger vehicles, it has seen a notable decrease in market share. In contrast, black has surged in popularity, gaining market share at the expense of white.

Consumer preferences also vary across different regions. For example, in North America, there is a growing preference for lighter shades of silver over darker grays, while in EMEA, the trend leans towards darker shades. This regional variation adds an intriguing dimension to the evolving color landscape.

Meanwhile, chromatic colors have remained stable, with no significant changes in their total market share (19%). This category includes a range of colors such as blue, red, brown, and beige, which continue to maintain their popularity among customers.

EMEA: Diverse color tastes across nations; achromatic shades reign while chromatic favorites differ

The achromatic colors – white, black, gray, and silver – gained two percentage points in Europe, the Middle East, and Africa (EMEA). Car buyers shifted away from lighter colors of white and silver, to darker shades of black and gray. Premium cars had more effects pigments than entry and mid-price classes, showing the depth and creativity of color.

When European consumers chose colors, there were country-specific preferences. Germany loves blue (11%), Spain and the UK prefer red and orange (approximately 9%), France adores green (6%), and Italy shows its love for all the colors, with its share of chromatic colors being the largest among all five countries (30%).

“While the achromatic colors are still the most popular, each country appears to have its favorite place on the chromatic realm,” said Mark Gutjahr, global head of automotive color design for BASF. “Different color distribution could be seen in each of the major EMEA countries, and in general. Our customers, the automakers, have left a lot of room for individuality and creativity in car dealerships now, and car buyers are taking advantage of that.”

North America: Lighter achromatic colors and more effects pigments show up

Like EMEA, achromatic colors in North America – white, black, silver, and gray – gained two percentage points overall. Consumers moved in a lighter direction after automakers retired several gray colors. Those were often replaced with shades of silver.

North America also had the highest share of red cars compared to other regions in 2023. However, red was not able to beat blue as the most popular chromatic color in North America.

“We’re experiencing the same shift that other regions are seeing,” said Elizabeth M. Hoffmann, color designer for North America. “The old standard color palette no longer applies. Lighter shades are getting more popular, taking market share from gray. More and more choices have effects pigments to give them intensity and excitement.”

Asia Pacific: Increasing chromatic colors with more variations in effects

Continuing its leading position in the new automotive color palette, the share of chromatic colors in Asia Pacific was slightly up compared to 2022. The popularity of natural colors increased, especially green. Lighter colors became more popular, especially light grayish colors and silver.

Part of the reason Asia Pacific is more diverse in color is for the great variation of body types. Fresh shades can be seen in New Energy Vehicles (NEVs) especially more green and purple-influenced colors.

“As various new vehicles hit the roads, it is only natural that a more vibrant color palette would follow,” said Chiharu Matsuhara, head of automotive color design for Asia Pacific. “With new automakers creating new vehicles in Asia, they are asking for something more than the usual color wheel. They want something bold and creative on their new designs, and young consumers appreciate those colors.”

South America: Continues to be the region with the largest share of achromatic colors

South America historically has a conservative approach to colors, with a huge portion of achromatic colors in 2023. A total of 86% of new vehicles assembled in South America had either white, black, silver, or gray bodies, the most among all regions. The proportion of silver is also highest in South America.

With that kind of market, more and more automakers are choosing effects pigments to make the achromatic colors stand out. More cars were delivered with effects pigments in all body sizes compared to 2022.

“Colors aren’t just colors any more. They are experiences,” said Marcos Fernandes, director, BASF Coatings South America. “Whether it’s a pearl or metal flake or other pigment, the effects make the color leap from the vehicle into the eyes of the beholder. It gives a certain flair that’s becoming more and more popular.”

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 non-commercial vehicles in 2023.

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. This portfolio is supplemented by "Beyond Paint Solutions", which enable new applications with innovative surfaces. 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 2022, the Coatings division achieved global sales of about €4.2 billion.

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