



Global Color Popularity

Less is More



Big is Beautiful



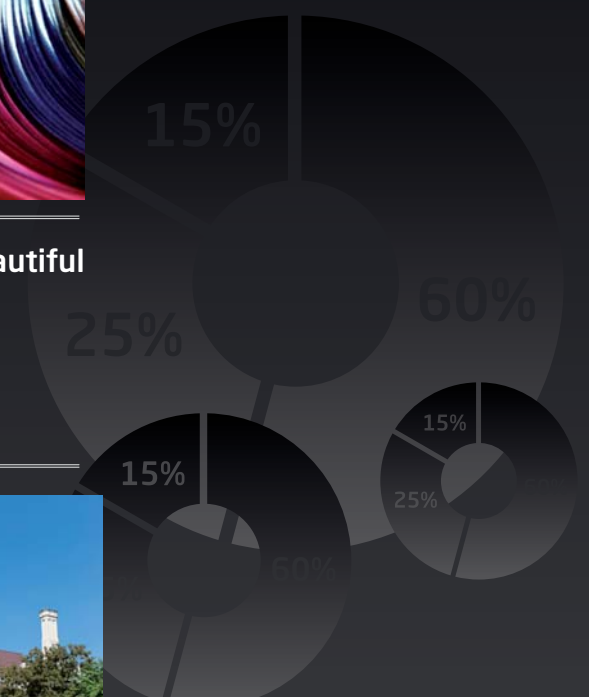
My Home is My Castle

As Time Goes By



2013 Popularity 2014-2017 Trends

Introduction of
2014 Color Show "Say it with Color!"



Global Automotive Color Popularity Report 2013

Axalta Coating Systems

Continuing a 60 year tradition, the Axalta Coating Systems 2013 Color Popularity Report reviews the past year of automotive color choices and forecasts the trends ahead around the world. With over 145 years of experience developing automotive colors, Axalta has a unique understanding of color science and technologies that shape industry trends and help manufacturers meet evolving consumer preferences.

GLOBAL

White strengthened its position as the most popular automotive color among consumers worldwide in 2013, growing in popularity by six percentage points over the prior year. Within the white space, 22 percent of vehicles were solid white and seven percent were pearl white. Black was the second most popular color globally, with 20 percent of sales, but effect black was preferred more than solid black. Silver at 15 percent and gray at 12 percent waned in popularity, while red held steady at eight percent. Blue and brown/beige spaces each held five percent of the global market. The remaining color choices revealed low popularity for green, orange, purples and other spaces, although there was a small increase in the yellow/gold area. Overall, neutral colors have been widely popular over the last decade and make up 76 percent of today's vehicles.

NORTH AMERICA

In North America, white, at 26 percent, continued to increase in popularity and remained the most popular color choice for the seventh consecutive year. At 20 percent, black also increased in popularity as consumers gravitated toward black effects in the luxury and luxury SUV segments. As the popularity of silver increased in the early 2000s, other neutrals, black and gray followed as well. This trend brought the neutral color palette to an all-time high. More recently, silver began a slow decline, along with gray. Today, the neutrals are modernized with sparkling effects and complex hues to drive a variety of premium color choices. The two most popular chromatic colors choices in North America are red at nine percent and blue at seven percent. Looking ahead, we forecast that these stronger hues will grow in popularity across a variety of vehicle segments.

Mexico largely prefers the lighter neutrals with white at 32 percent and silver at 18 percent. Black falls third at 17 percent in Mexico. Other colors fall in line with the overall North American trends.

EUROPE

Europe's preference for white increased five percent in 2013 to capture 29 percent of new car sales with solid white the most popular variant. At 21 percent, black was the second most preferred color but decreased in popularity compared to 2012. The preference for black effect colors over solid black was seen in all vehicle segments but observed most on luxury and luxury SUV vehicles. Overall interest in gray and silver waned in 2013; a trend that appeared in other parts of the world as well. Blue decreased slightly and red increased slightly to bring both to seven percent in popularity. There has been growing interest in the brown/beige and yellow/gold tones over the past few years and, while still low in overall popularity, these colors are spaces to watch on vehicles in the future.

ASIA

In Asia, the popularity of neutral color spaces reached 75 percent of the market, a two percent increase over 2012 when white, black, silver and gray comprised 73 percent of the automotive palette. While showing renewed strength, the popularity of neutrals still fell short of 2001 levels when these neutrals made up 86 percent of the palette. Overall, red was the most popular non-neutral color used on vehicles.

Japan continued to report white as the most popular color for the seventh year in a row, with black and silver followed in the ranking. Gray's popularity at seven percent is low compared to other world trends. Blue was the most popular non-neutral color used on vehicles, at seven percent of the market.



In China, black continued to remain strong, especially on luxury vehicles. However, interest in white increased in line with its overall global popularity. Blue, green and yellow were low in popularity compared to colorful reds and browns.

South Korea saw a five percent decrease in silver and a four percent increase in white. For the second year in a row, white remained the number one preference at 32 percent of the market. Silver was a distant second at 18 percent. Gray held third place followed by black as the lighter color spaces dominated the market.

Silver continued to be the most popular color in India at 30 percent. White was a close second at 28 percent, as these light colors proved to be popular in the warm climate. Brown/beige was also popular at 10 percent but darker colors such as black received little interest, holding only seven percent of the market.

SOUTH AMERICA

White and silver were at the top of the charts in South America. Silver had been a top running color for the past decade, but in 2013, white took the top spot for the first time in twelve years at 29%, with black and gray following silver in popularity. At nine percent, red remained the fifth most popular color, as it has been since 2003. Brown/beige, blue and green colors slightly increased in popularity over the past year, giving more color to the region overall.

OTHER COUNTRIES AND REGIONS

In Russia, white continued to hold the top color space at 18 percent. In contrast to other countries, green was quite popular in Russia with eight percent of the market. Light color spaces dominated Africa with white, silver and gray at the top, with white holding a strong lead at 43 percent while red being the most popular non-neutral color preference at six percent followed by blue at four percent.

SAY IT WITH COLOR!

AXALTA'S COLOR TREND SHOW FORECASTS FOUR INDUSTRY MEGATRENDS

The Axalta Coatings Systems color trend forecasting research provides a next generation global color palette for automotive designers. Say It With Color! provides automotive manufacturers around the world with an opportunity to see possible OEM grade colors in both real and virtual environments. Axalta's show leverages decades of experience in understanding that color is an expression of consumer personality that translates passions, emotions and personal style into vehicle purchasing decisions. This year's show features four overarching automotive trend categories which have been culled from an analysis of the latest trends across the globe. We foresee growing interest in new soft hues with opaque characteristics, vivid colors with colored sparkle effects, warm and complex hues with an urban appeal and modern interpretations of neutral spaces.

LESS IS MORE

"Less is More" embraces muted hues or light metallics that are soothing and modern. These colors offer a fresh approach to the light variations seen in the past. The colors are more opaque and have finer flake appearance than typical light metallics, offering a calming and luxurious premium appearance. The colors can be used on a large variety of vehicle types, including small exclusive brands, intermediate size vehicles and eco-concept cars. These colors are also inspired by their use in contemporary art and architecture as they convey the colors of simple and modern design.

BIG IS BEAUTIFUL

Consumers who favor the color group we call "Big Is Beautiful" want to express themselves in a manner that sets them apart from the crowd. Bold personalities best fit the brilliant colors in this group and they appeal to those who enjoy spontaneity and express a strong personality. Crisp colors with high chroma are best used on sporty models, small cars, and brand specific lines, including limited editions. The colors are inspired by vibrant and vivid fashion designs, pop art and bold sportswear.

HOME IS MY CASTLE

Our third trend, "Home Is My Castle," reflects recent movements in interior design, timeless fashion, the health and wellness industry, and traditional art. Subtle colors, such as blues and greens, are calming yet modern and innovative. A large variety of these color spaces are well suited for hybrid and eco-brand vehicles because of their natural characteristics. Other bold versions, such as burgundy and copper are styled for intermediate and large SUV's. The soothing colors are applicable to any size body style.

AS TIME GOES BY

The final group, "As Time Goes By," responds directly to the Axalta Coating Systems global color popularity report. The top colors since the mid 2000's include white, black, silver and gray and relate to the mainstay colors in today's global automotive market. These expressions of automotive history are heightened with new color spaces that fit a global manufacturing strategy and elegant appeal. Sustainable for a global market, colors in this category are extending into longer run colors with an expansive vehicle line-up.

Axalta Coating Systems is proud to present Say It With Color! and express our passion for automotive coatings and our commitment to serve the automobile industry around the world.

SIX DECADES OF COLORFUL AUTOMOTIVE MOMENTS.

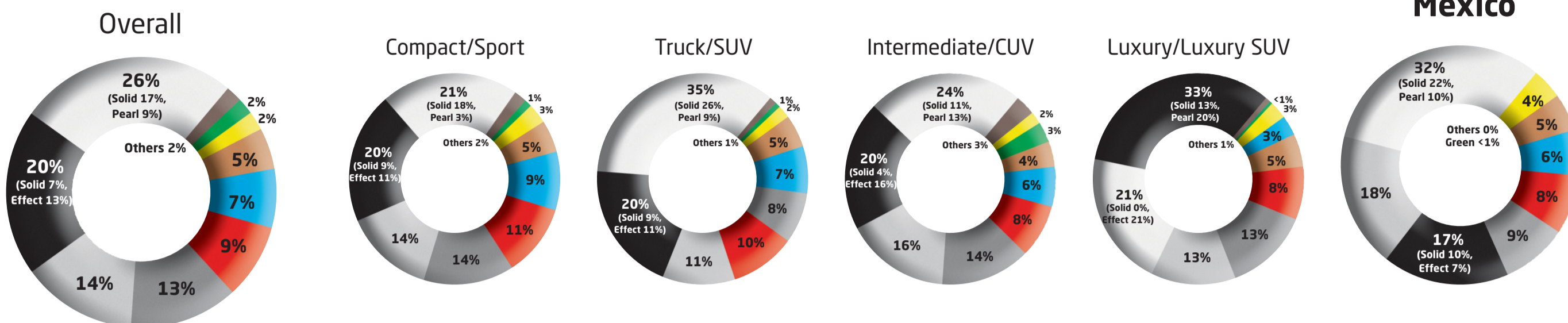
As the leader in color trending information for the automotive community, Axalta has gathered more than six decades of information that showcase the most popular annual colors in four major automotive regions: North America, Europe, Asia and South America. Every year, starting in 1953, our annual color report tracked automotive color preferences. Our one-of-a-kind report demonstrates the evolution of global automotive color preferences. For the past decade, white and silver have been the automotive colors of choice around the world. A longer lens reveals that consumers have preferred more robust colors. In the 30 years from the 1950s through the 1970s, blues, greens, coppers and reds filled the roads worldwide. In the 1980s, color variety was king in North America, while reds dominated Europe, but in Asia a strong preference for whites emerged and remains strong to this day. During the 1990s and into the early 2000s, black dominated the roads in Europe, representing the top color for 11 out of 12 consecutive years. Color preferences began to harmonize globally at the beginning of the 21st century when, for the first time, all four primary regions in our survey were dominated by the classic neutral shades of white, silver, gray and black.



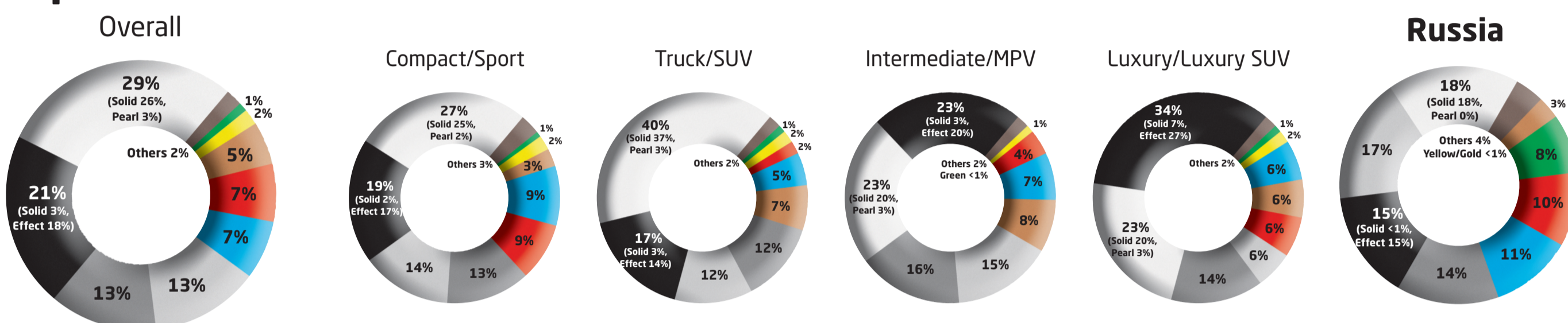
Global Color Popularity 2013



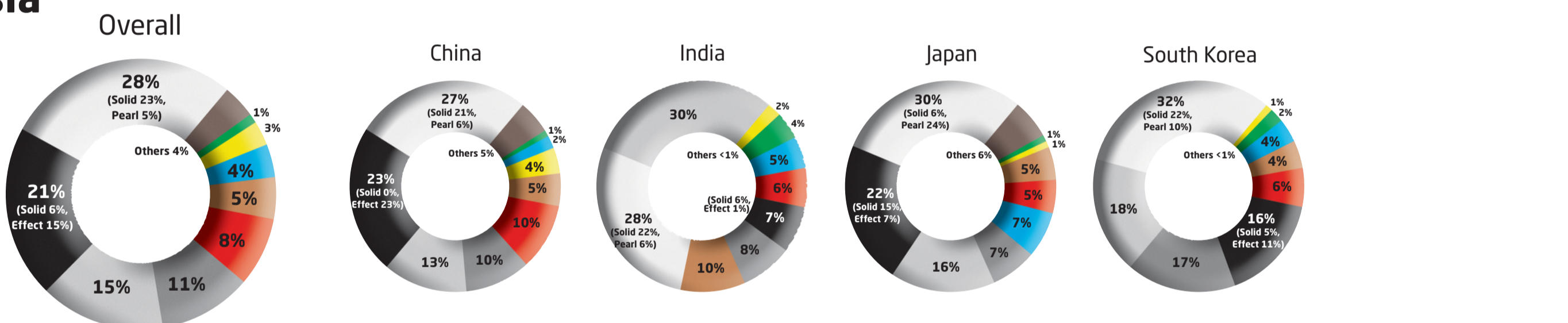
North America (Includes Mexico)



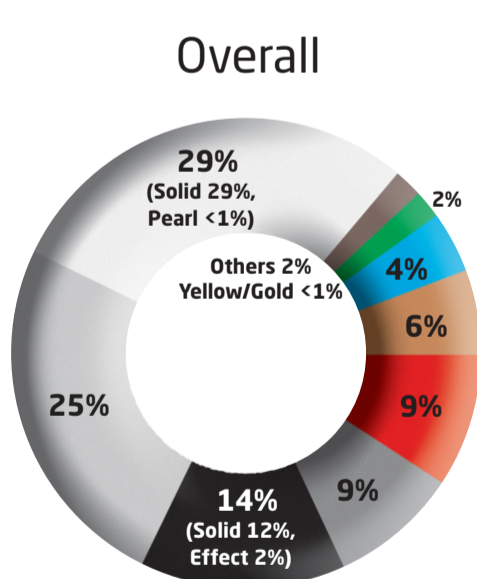
Europe



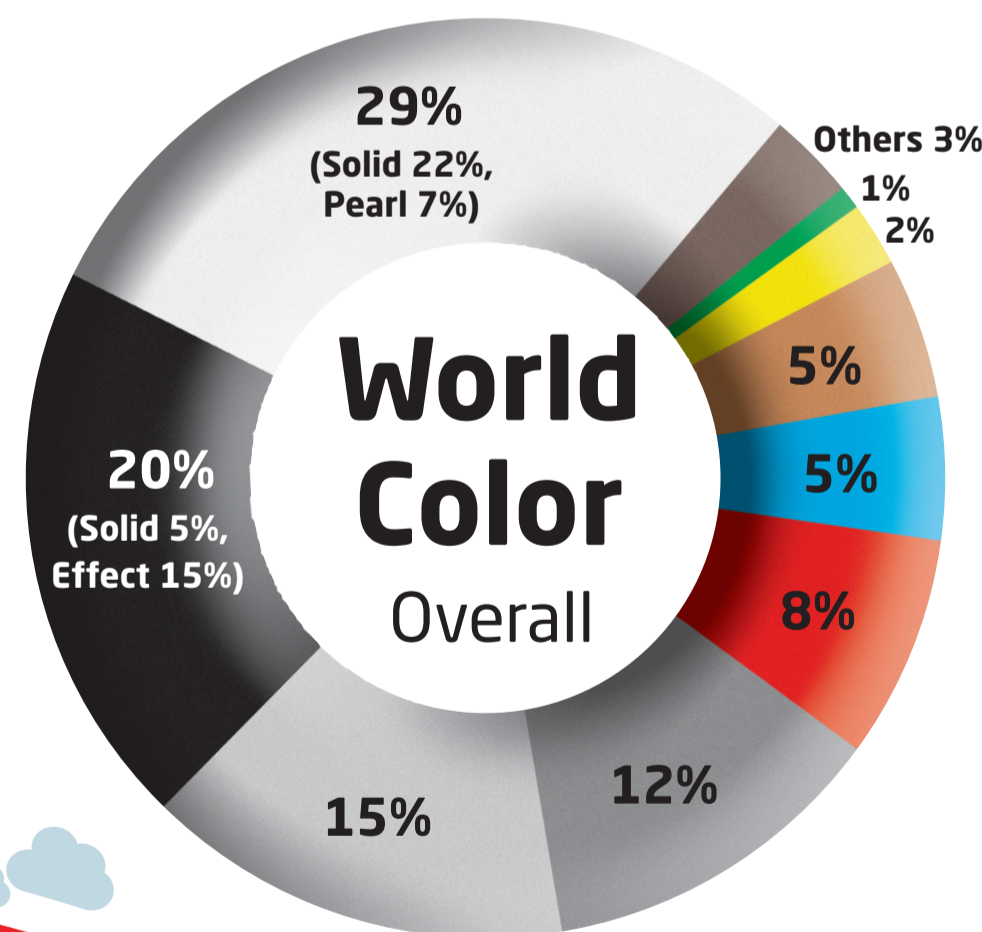
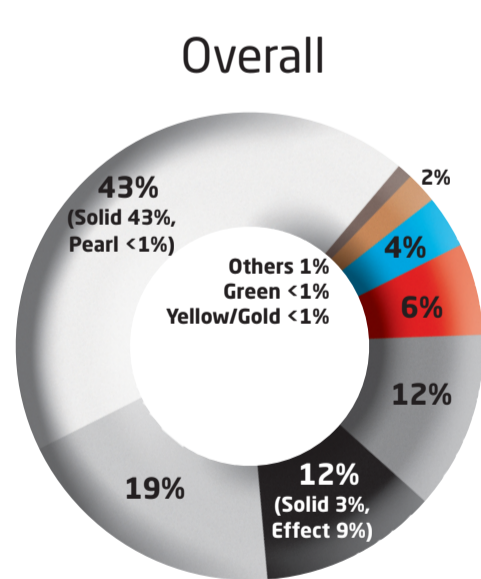
Asia



South America



Africa



one brilliant world.

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