

Global Aftermarket Automotive Friction Materials Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GC361083B300EN.html>

Date: August 2026

Pages: 155

Price: US\$ 3,480.00 (Single User License)

ID: GC361083B300EN

Abstracts

According to our (Global Info Research) latest study, the global Aftermarket Automotive Friction Materials market size was valued at US\$ 14950 million in 2025 and is forecast to a readjusted size of US\$ 18605 million by 2032 with a CAGR of 3.2% during review period.

Aftermarket automotive friction materials are replacement friction composites used for brake-system repair and maintenance after a vehicle's original sale. The main products include disc brake pads, drum brake linings, friction blocks mounted on brake shoes, and parking-brake friction components. They convert vehicle kinetic energy into heat through controlled friction. Key upstream inputs include phenolic resins and other binders; steel, aramid, mineral, and glass fibers; graphite, rubber, barite, metal powders, abrasives, lubricants, and functional fillers. In addition to braking performance, wear resistance, fade resistance, NVH performance, and rotor or drum compatibility, aftermarket products must offer broad vehicle coverage, installation fitment, formulation consistency, regulatory compliance, and competitive pricing. Major downstream channels include independent garages, repair chains, dealer service networks, fleet workshops, parts distributors, and e-commerce retail platforms.

In 2025, global aftermarket automotive friction materials production reached approximately 950 million sets, with an average global market price is \$15 per set.

From a global industry perspective, aftermarket automotive friction materials are an important part of the vehicle maintenance and replacement-parts ecosystem. Demand is primarily driven by the installed vehicle parc, vehicle age, mileage, brake wear, scheduled maintenance and accident repair. Products serve passenger cars, light

commercial vehicles, heavy trucks, buses, trailers and selected off-highway applications. Passenger-car aftermarket demand is mainly concentrated in disc brake pads, while heavy commercial vehicles and trailers continue to require substantial volumes of drum brake linings, brake-shoe friction materials and heavy-duty disc pads. UN Regulation No. 90 specifically covers replacement brake lining assemblies, drum brake linings, brake discs and drums for friction braking systems on motor vehicles and trailers, demonstrating that replacement braking products are subject to distinct requirements for fitment, braking performance, marking and packaging.

Compared with the OEM market, aftermarket competition is not based solely on friction coefficient or initial purchase price. It is a combined competition in vehicle coverage, fitment accuracy, reliability, service life, channel availability and total repair cost. Aftermarket suppliers typically develop different formulation grades for vehicle platforms, rotor sizes, caliper configurations, axle loads, braking temperatures and regional operating conditions, including standard, low-noise, low-dust, long-life, heavy-duty and high-performance product lines. For commercial vehicles and fleets, relining interval, braking cost per kilometer, vehicle downtime risk and braking consistency are often more important than unit price. PRI's brake-lining qualification program, for example, is designed to help fleet operators select aftermarket brake linings for tractor-trailer combinations and single trucks.

In terms of technology trends, aftermarket automotive friction materials are moving toward low-copper or copper-free chemistry, lower dust, lower noise, lower wear, stronger high-temperature stability, corrosion resistance, EV compatibility, longer service life and higher manufacturing consistency. The U.S. EPA's Copper-Free Brake Initiative called for reducing copper in brake pads to below 5% by weight in 2021 and to 0.5% by 2025, while also reducing lead, cadmium, mercury, asbestiform fibers and chromium-six salts. This is forcing aftermarket suppliers to rebalance mineral fillers, graphite, metal sulfides, ceramic particles, reinforcing fibers and functional lubricants. The EU's Euro 7 framework also brings brake-particle emissions into vehicle-emissions regulation, increasing attention on lower-wear, lower-dust and more stable friction formulations.

Electric vehicles do not eliminate demand for aftermarket friction materials, but they change replacement cycles and performance requirements. Regenerative braking can reduce routine friction-brake use and extend pad life in some operating conditions, while low-speed braking, emergency braking, high-speed stops, full-battery conditions and limited regenerative capacity still require friction braking. As a result, aftermarket products increasingly need to address low-temperature braking response, corrosion

resistance and anti-sticking behavior after long parking periods, low drag, low noise and reliable rotor compatibility. Considering regulatory changes and EV operating characteristics, competition is gradually shifting away from low-cost replacement parts alone toward compliance, precise fitment, low-dust performance, NVH optimization, longer life and stable supply capability.

This report is a detailed and comprehensive analysis for global Aftermarket Automotive Friction Materials market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Aftermarket Automotive Friction Materials market size and forecasts, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global Aftermarket Automotive Friction Materials market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global Aftermarket Automotive Friction Materials market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global Aftermarket Automotive Friction Materials market shares of main players, shipments in revenue (\$ Million), sales quantity (K Sets), and ASP (US\$/Set), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Aftermarket Automotive Friction Materials

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Aftermarket Automotive Friction Materials market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BOSCH, TMD Friction Group, Tenneco LLC, Akebono Brake Industry, Nisshinbo Brake, Frasle Mobility S.A., Sangsin Brake, ADVICS, ZF, Brembo, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Aftermarket Automotive Friction Materials market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Asbestos Friction Material

Semi-Metallic Friction Material

Non-Asbestos Organic (NAO) Friction Material

Market segment by Product Form

Disc Brake Pads

Brake Linings

Others

Market segment by Vehicle

Internal Combustion Engines

New Energy Vehicles

Market segment by Application

Passenger Car

Commercial Vehicle

Major players covered

BOSCH

TMD Friction Group

Tenneco LLC

Akebono Brake Industry

Nisshinbo Brake

Frasle Mobility S.A.

Sangsin Brake

ADVICS

ZF

Brembo

Shandong Gold Phoenix

Shandong Xinyi Auto Parts Manufacturing

Zhuhai Glory Friction Material

Rane Brake Lining Limited

Hindustan Composites Limited

Sundaram Brake Linings Limited

ASK Automotive Limited

ITT Corporation

Jiangsu Fangyi Friction Material

MAT Friction Group

Shandong Double Link Brake Material

Zhejiang Lamda Technology

Hangzhou Annat Industry

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Global Aftermarket Automotive Friction Materials Market 2026 by Manufacturers, Regions, Type and Application,...

Chapter 1, to describe Aftermarket Automotive Friction Materials product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Aftermarket Automotive Friction Materials, with price, sales quantity, revenue, and global market share of Aftermarket Automotive Friction Materials from 2021 to 2026.

Chapter 3, the Aftermarket Automotive Friction Materials competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Aftermarket Automotive Friction Materials breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Aftermarket Automotive Friction Materials market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Aftermarket Automotive Friction Materials.

Chapter 14 and 15, to describe Aftermarket Automotive Friction Materials sales channel, distributors, customers, research findings and conclusion.

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