

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

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Abstracts

According to our (Global Info Research) latest study, the global Automotive Friction Material market size was valued at US\$ 23013 million in 2025 and is forecast to a readjusted size of US\$ 28584 million by 2032 with a CAGR of 3.2% during review period.

Automotive friction materials are engineered composite products installed in disc and drum brake systems to convert vehicle kinetic energy into heat through controlled friction. They are delivered mainly as disc brake pads, drum brake linings, and friction blocks for brake shoes. Key upstream inputs include phenolic resins and other binders; steel, mineral, glass, and aramid fibers; graphite, barite, rubber, alumina, metal powders, mineral fillers, abrasives, and friction modifiers. In practical vehicle applications, the formulation must balance braking efficiency, fade resistance, wear life, rotor compatibility, noise-vibration-harshness performance, brake dust, and cost. The principal downstream markets are OEM production and aftermarket replacement for passenger vehicles, light commercial vehicles, trucks, and buses.

In 2025, global automotive friction material production reached approximately 1.1 billion sets, with an average global market price is \$20 per set.

From a global industry perspective, automotive friction material is a critical material category within vehicle chassis safety systems and the automotive aftermarket consumables chain. Core applications include disc brake pads, drum brake linings, commercial-vehicle brake linings, clutch facings and high-performance braking components. Performance is determined not by one raw material alone, but by formulation design, molding and curing process, backing-plate bonding, friction-pair

matching and vehicle duty cycle. Vehicle mass, maximum speed, axle load, rotor metallurgy, thermal management and NVH requirements differ substantially across passenger cars, light commercial vehicles, heavy trucks, hybrids and battery-electric vehicles, so OEM and aftermarket suppliers typically develop application-specific friction formulations.

In terms of technology routes, automotive friction materials are commonly classified into non-asbestos organic (NAO), low-metallic, semi-metallic, ceramic and heavy-duty high-temperature formulations. The industry is moving toward low-copper or copper-free chemistry, lower dust, lower noise, lower wear, stronger thermal stability, better corrosion resistance, longer service life and automotive-grade consistency. The U.S. EPA's Copper-Free Brake Initiative set targets to reduce copper in brake pads to below 5% by weight in 2021 and to 0.5% by 2025, while also reducing mercury, lead, cadmium, asbestiform fibers and chromium-six salts. This has accelerated copper substitution and environmentally improved friction-material development. Low-copper and copper-free formulations generally require a redesigned balance of metal sulfides, minerals, ceramic particles, graphite, fibers and functional fillers to maintain friction stability, fade resistance, rotor wear performance and NVH behavior.

Electric and hybrid vehicles are changing the operating conditions of automotive friction materials rather than eliminating friction braking. Regenerative braking reduces the frequency of conventional brake use, which can reduce pad wear, but friction brakes remain necessary during emergency braking, high-speed stops, low-speed braking and conditions where regenerative braking is limited. Lower friction-brake usage can also increase risks related to rotor corrosion, material adhesion and brake noise, raising requirements for low-temperature braking response, corrosion resistance, low-noise performance, low drag and reliable friction-material-to-backing-plate bonding in EV and hybrid platforms.

The main growth drivers come from three areas. First, the global vehicle parc, aftermarket maintenance demand and commercial-vehicle service requirements continue to support replacement demand for brake pads, brake linings and clutch facings. Second, vehicle lightweighting, higher vehicle speeds, electrification and increasing intelligence are raising requirements for thermal stability, NVH control, durability and braking-system safety margins, pushing friction materials toward higher-performance formulations. Third, environmental regulation and concern over brake-related particulate emissions are accelerating the transition from traditional high-copper, high-metal-content and environmentally burdensome formulations toward low-copper, copper-free, low-dust, low-noise and more consistent material systems.

This report is a detailed and comprehensive analysis for global Automotive Friction Material 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 Automotive Friction Material market size and forecasts, in consumption value (\$ Million), sales quantity (K Sets), and average selling prices (US\$/Set), 2021-2032

Global Automotive Friction Material 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 Automotive Friction Material 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 Automotive Friction Material 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 Automotive Friction Material

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 Automotive Friction Material 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

Automotive Friction Material 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 Sales Channel

- OEM

- Aftermarket

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:

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

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

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

Chapter 4, the Automotive Friction Material 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 Automotive Friction Material 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 Automotive Friction Material.

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

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