

Global Automotive Friction Material Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Automotive Friction Material market size is expected to reach \$ 28584 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032).

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 studies the global Automotive Friction Material production, demand, key

manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Friction Material and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automotive Friction Material that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Friction Material total production and demand, 2021-2032, (K Sets)

Global Automotive Friction Material total production value, 2021-2032, (USD Million)

Global Automotive Friction Material production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Sets), (based on production site)

Global Automotive Friction Material consumption by region & country, CAGR, 2021-2032 & (K Sets)

U.S. VS China: Automotive Friction Material domestic production, consumption, key domestic manufacturers and share

Global Automotive Friction Material production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Sets)

Global Automotive Friction Material production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

Global Automotive Friction Material production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Sets)

This report profiles key players in the global Automotive Friction Material market based on the following parameters - company overview, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automotive Friction Material market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Sets) and average price (US\$/Set) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Automotive Friction Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Friction Material Market, Segmentation by Type:

Asbestos Friction Material

Semi-Metallic Friction Material

Non-Asbestos Organic (NAO) Friction Material

Global Automotive Friction Material Market, Segmentation by Product Form:

Disc Brake Pads

Brake Linings

Others

Global Automotive Friction Material Market, Segmentation by Sales Channel:

OEM

Aftermarket

Global Automotive Friction Material Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

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

Key Questions Answered:

1. How big is the global Automotive Friction Material market?
2. What is the demand of the global Automotive Friction Material market?
3. What is the year over year growth of the global Automotive Friction Material market?
4. What is the production and production value of the global Automotive Friction Material market?
5. Who are the key producers in the global Automotive Friction Material market?
6. What are the growth factors driving the market demand?

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