

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

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Abstracts

The global Automotive Wet Friction Materials market size is expected to reach \$ 2934 million by 2032, rising at a market growth of 4.4% CAGR during the forecast period (2026-2032).

Automotive wet friction materials are friction materials designed to operate in automatic transmission fluid, hydraulic oil or dedicated lubricants, and are typically used as wet friction plates, lock-up clutch linings, single-sided or double-sided friction plates, and friction elements in clutch packs. Paper-based fiber composites are the dominant material system, while carbon-based, nonwoven, sintered metal, molybdenum-coated and specialty composites are also used. Upstream inputs include cellulose fiber, aramid fiber, phenolic resin, rubber, graphite, carbon materials, friction modifiers, steel cores and adhesives. Downstream applications include AT, CVT, wet DCT, DHT/hybrid transmissions, torque-converter lock-up clutches, AWD couplings and limited-slip differentials.

In 2025, global automotive wet friction materials production reached approximately 1.9 billion units, with an average global market price is \$1.1 per unit.

Automotive wet friction materials are friction-functional materials used in wet automotive transmission and braking systems. They operate in automatic transmission fluid, lubricating oil, or dedicated drivetrain fluids and are typically used as the core friction layer in wet friction plates, wet clutch discs, lock-up clutch plates, brake plates, all-wheel-drive coupling plates, and limited-slip differential plates. Their main applications include automatic transmissions, wet dual-clutch transmissions, dedicated hybrid transmissions, torque-converter lock-up clutches, CVT launch clutches, intelligent all-wheel-drive torque-transfer systems, and limited-slip differentials. Under the combined effects of oil

film, contact pressure, and speed difference, these materials enable torque transmission, shift engagement, lock-up control, braking, and torque distribution.

By material system, automotive wet friction materials mainly include paper-based wet friction materials, carbon-based wet friction materials, non-woven wet friction materials, and other composite wet friction materials. Paper-based materials are the mainstream solution in AT, wet DCT, and hybrid transmission applications, offering high porosity, good oil absorption, tunable friction behavior, moderate cost, and stable high-volume production consistency. Carbon-based materials are more suitable for high thermal load, high energy density, continuous slip, and high-durability applications. Non-woven materials provide advantages in oil permeability, compression recovery, wear resistance, and shift comfort. In practice, material selection must be coordinated with steel-plate surface condition, fluid formulation, groove structure, engagement pressure, and electronic control strategy.

From a performance perspective, automotive wet friction materials must provide not only stable friction coefficient, but also low drag loss, reduced judder, low noise, high temperature resistance, wear resistance, fade resistance, fluid compatibility, and long service life. As automatic transmissions move toward more gear ratios, higher efficiency, and higher torque density, and as wet DCTs and hybrid systems require compact multi-plate packages, frequent engagement, and precise control, wet friction material design is shifting from standalone friction performance toward system-level matching among friction material, steel plate, fluid, groove design, and control strategy.

From an industry perspective, demand for automotive wet friction materials is mainly driven by ATs, wet DCTs, hybrid transmissions, plug-in hybrid systems, intelligent all-wheel-drive systems, and high-torque drivetrains. Single-speed battery-electric drivetrains reduce demand for some conventional multi-plate clutch applications, but hybrids, plug-in hybrids, high-efficiency automatic transmissions, and premium AWD systems will continue to support wet friction material usage. Future product development will focus on higher energy density, lower drag, lower wear, reduced judder, higher heat resistance, low-VOC formulations, environmentally compliant resin systems, low-copper or copper-free materials, and higher manufacturing consistency.

This report studies the global Automotive Wet Friction Materials production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automotive Wet Friction Materials 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 Wet Friction Materials that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Automotive Wet Friction Materials total production and demand, 2021-2032, (K Units)

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

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

Global Automotive Wet Friction Materials consumption by region & country, CAGR, 2021-2032 & (K Units)

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

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

Global Automotive Wet Friction Materials production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automotive Wet Friction Materials production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automotive Wet Friction Materials 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 Dynax, BorgWarner, Aisin Corporation, F.C.C., Miba AG, NSK Warner, Carlisle Brake & Friction, Jiangsu Lintex Advanced Materials, Zhejiang Kema Friction Materials, Alto Products Corp., 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 Wet Friction Materials market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$

Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) 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 Wet Friction Materials Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Automotive Wet Friction Materials Market, Segmentation by Type:

Paper-Based Friction Material

Non-Woven Friction Material

Carbon-Based Friction Material

Others

Global Automotive Wet Friction Materials Market, Segmentation by Drivetrain System:

Automatic Transmission(AT)

Dual-Clutch Transmission(DCT)

Continuously Variable Transmission(CVT)

Dedicated Hybrid Transmission(DHT)

Others

Global Automotive Wet Friction Materials Market, Segmentation by Sales Channel:

OEM

Aftermarket

Global Automotive Wet Friction Materials Market, Segmentation by Application:

Passenger Car

Commercial Vehicle

Companies Profiled:

Dynax

BorgWarner

Aisin Corporation

F.C.C.

Miba AG

NSK Warner

Carlisle Brake & Friction

Jiangsu Lintex Advanced Materials

Zhejiang Kema Friction Materials

Alto Products Corp.

Raybestos Powertrain

Key Questions Answered:

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

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