

Global Carbon-Carbon Composite Brake Discs Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Carbon-Carbon Composite Brake Discs market size is expected to reach \$ 1987 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Carbon-carbon composite brake discs refer to high-energy braking components manufactured from carbon fibre reinforced carbon matrix composites, typically formed through fibre preforming, chemical vapour infiltration or deposition, liquid impregnation and carbonisation, high-temperature heat treatment, oxidation protection and precision machining. The scope of this study focuses on C/C brake discs, rotors, stators, carbon heat sinks and heat packs used in aircraft wheel braking systems, military aircraft, certified civil aviation replacement programmes and selected top-tier motorsport applications. Their principal value lies in combining low density, high thermal capacity, high-temperature structural stability and repeatable friction performance under severe braking energy and thermal shock conditions.

Public pricing is limited: motorsport carbon-carbon discs can be observed at several thousand euros per disc in open channels, while certified aircraft discs and heat packs are generally priced through aircraft programme, certification, lifecycle and aftermarket supply contracts.

Based on our research, the carbon-carbon composite brake disc industry should be viewed as a high-certification aerospace safety component segment rather than a premium extension of the ordinary automotive brake disc market. Its core barriers lie in fibre preform architecture, densification process control, friction stability, oxidation protection, high-energy dynamometer validation, aircraft programme qualification and long-cycle aftermarket support. In this context, material capability alone is not sufficient

to define a credible manufacturer. A supplier must demonstrate the ability to deliver repeatable thermal-mechanical performance, comply with aircraft programme requirements and support replacement demand over a long service life.

The global supply structure remains concentrated. Safran Landing Systems, Collins Aerospace, Honeywell Aerospace and Parker Meggitt represent the primary global aerospace wheel-and-brake OEM group. China has developed a parallel domestic supplier base led by Xi'an Aviation Brake Technology, Beijing Beimo, Hunan Boyun, Xi'an Chaoma and Yantai Luhang, while DACC Carbon in South Korea and Rubin Aviation Corporation in Russia mainly serve regional military or domestic aircraft programmes. Motorsport carbon-carbon braking is a separate high-value, low-volume submarket where Brembo, PFC Brakes, AP Racing and SGL Carbon have stronger relevance.

Demand is underpinned by aircraft deliveries, in-service fleet growth and aftermarket replacement cycles. Airbus and Boeing both project more than 40,000 new aircraft deliveries over the 2025-2044 period, while passenger traffic is expected to continue expanding in 2026. Safran's decision to invest in a new aircraft carbon brake production facility in France further supports the view that leading suppliers expect sustained long-term demand for carbon brakes. In China, domestic aircraft programmes, civil aviation PMA replacement parts and military aviation upgrades provide a distinct growth channel for local suppliers.

Technologically, C/C brake discs retain strong relevance in aircraft and top-tier racing, but they should not be conflated with carbon-ceramic C/SiC brake discs used in high-performance road vehicles. Carbon-ceramic discs are better aligned with road-car requirements such as oxidation resistance, wet performance and broader low-temperature usability, whereas C/C brakes are designed for controlled, high-temperature and high-energy operating envelopes. This is why the narrow market scope in this report excludes road-car carbon-ceramic discs and focuses on aircraft C/C brake discs, heat packs and certified replacement parts.

This report studies the global Carbon-Carbon Composite Brake Discs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Carbon-Carbon Composite Brake Discs 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 Carbon-Carbon

Composite Brake Discs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Carbon-Carbon Composite Brake Discs total production and demand, 2021-2032, (Units)

Global Carbon-Carbon Composite Brake Discs total production value, 2021-2032, (USD Million)

Global Carbon-Carbon Composite Brake Discs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Carbon-Carbon Composite Brake Discs consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Carbon-Carbon Composite Brake Discs domestic production, consumption, key domestic manufacturers and share

Global Carbon-Carbon Composite Brake Discs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Carbon-Carbon Composite Brake Discs production by Product Form, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Carbon-Carbon Composite Brake Discs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Carbon-Carbon Composite Brake Discs 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 Safran Landing Systems, Collins Aerospace, Honeywell Aerospace, Parker Meggitt Aircraft Braking Systems, Xi'an Aviation Brake Technology, Beijing Beimo High-tech Frictional Material, Hunan Boyun New Materials, Xi'an Chaoma Technology, Yantai Luhang Carbon Materials, DACC Carbon, 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 Carbon-Carbon Composite Brake Discs market

Detailed Segmentation:

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

Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by manufacturer, by Product Form, 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 Carbon-Carbon Composite Brake Discs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Carbon-Carbon Composite Brake Discs Market, Segmentation by Product Form:

Brake Disc / Rotor

Stator / Pressure Plate

Carbon Heat Sink / Heat Pack

Other

Global Carbon-Carbon Composite Brake Discs Market, Segmentation by Supply Route:

OEM Line-fit

Certified Aftermarket / PMA

Military Programme Supply

Racing

Other

Global Carbon-Carbon Composite Brake Discs Market, Segmentation by Technology
Route:

CVI / CVD-densified C/C

Liquid Impregnation Carbonised C/C

Hybrid Densification C/C

Other

Global Carbon-Carbon Composite Brake Discs Market, Segmentation by Application:

Commercial Aircraft

Military Aircraft

Motorsport

High-energy Braking

Other

Companies Profiled:

Safran Landing Systems

Collins Aerospace

Honeywell Aerospace

Parker Meggitt Aircraft Braking Systems

Xi'an Aviation Brake Technology

Beijing Beimo High-tech Frictional Material

Hunan Boyun New Materials

Xi'an Chaoma Technology

Yantai Luhang Carbon Materials

DACC Carbon

Rubin Aviation Corporation

Brembo N.V.

PFC Brakes

SGL Carbon SE

Mersen

AP Racing

Key Questions Answered:

1. How big is the global Carbon-Carbon Composite Brake Discs market?
2. What is the demand of the global Carbon-Carbon Composite Brake Discs market?
3. What is the year over year growth of the global Carbon-Carbon Composite Brake Discs market?
4. What is the production and production value of the global Carbon-Carbon Composite Brake Discs market?
5. Who are the key producers in the global Carbon-Carbon Composite Brake Discs market?

6. What are the growth factors driving the market demand?

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