

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

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Abstracts

The global Passenger Cars Friction Material market size is expected to reach \$ 17376 million by 2032, rising at a market growth of 3.1% CAGR during the forecast period (2026-2032).

Passenger cars friction materials are engineered composites used in disc and drum brake systems to convert vehicle kinetic energy into heat through controlled friction. They are supplied mainly as brake pads, brake linings, and friction blocks for brake shoes. Major upstream materials include phenolic resins and other binders; aramid, steel, and mineral fibers; graphite, barite, rubber, metal powders, abrasives, lubricants, and functional fillers. In practical vehicle operation, the formulation must balance braking stability, fade resistance, wear life, rotor compatibility, noise-vibration-harshness performance, brake dust, and environmental compliance. Key downstream markets are passenger-car OEM assembly and aftermarket replacement through workshops, service chains, e-commerce, and independent distributors.

In 2025, global passenger cars friction material production reached approximately 900 million sets, with an average global market price is \$15 per set.

From a global industry perspective, passenger cars friction materials are critical materials within vehicle chassis safety systems and the automotive aftermarket consumables chain. They serve internal-combustion vehicles, hybrid electric vehicles, plug-in hybrids and battery electric vehicles. Their performance is not determined by one ingredient alone, but by the interaction of formulation chemistry, molding and curing processes, friction-material-to-backing-plate bonding, rotor matching, vehicle mass, speed, axle load, thermal conditions and NVH requirements. Passenger-car suppliers therefore develop differentiated formulations for mainstream passenger cars, premium

models, SUVs, performance vehicles and new-energy vehicles.

In terms of technology direction, passenger car friction materials are moving away from traditional high-metal-load formulations toward low-copper or copper-free systems, lower dust, lower noise, lower wear, stronger thermal stability, better corrosion resistance and higher manufacturing 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 transition requires material suppliers to rebalance friction stability, noise, fade resistance, wear and rotor compatibility through combinations of mineral fillers, graphite, ceramic particles, metal sulfides, reinforcing fibers and functional lubricants.

Electric and hybrid vehicles are changing the operating conditions of passenger car friction materials rather than eliminating friction braking. Regenerative braking can reduce conventional brake usage and pad wear, but friction brakes remain essential during emergency braking, high-speed braking, low-speed stopping, full-battery conditions and situations where regenerative capacity is constrained. As a result, new-energy passenger vehicles place greater emphasis on low-temperature response, low noise, low drag, corrosion resistance, anti-sticking performance and braking reliability after long parking periods. Because EVs operate more quietly, even moderate brake noise can become more noticeable to drivers and passengers.

The main growth drivers come from three areas. First, the expanding passenger-car parc and the recurring replacement cycle for brake pads, brake linings and parking-brake components provide a stable demand base. Second, electrification, lightweighting and premiumization are raising requirements for braking comfort, NVH control, thermal stability, durability and safety margins, pushing friction materials toward higher-performance formulations. Third, non-exhaust particulate-emission regulation is becoming more important. The EU's Euro 7 framework brings brake-particle emissions into regulation and sets brake-emission requirements by vehicle category, encouraging the development of lower-wear, lower-dust and more stable friction-material systems.

This report studies the global Passenger Cars Friction Material production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Passenger Cars 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 Passenger Cars 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 Passenger Cars Friction Material Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Passenger Cars Friction Material Market, Segmentation by Type:

Semi-Metallic Friction Material

Non-Asbestos Organic (NAO) Friction Material

Others

Global Passenger Cars Friction Material Market, Segmentation by Product Form:

Disc Brake Pads

Brake Linings

Others

Global Passenger Cars Friction Material Market, Segmentation by Vehicle:

Internal Combustion Engines

New Energy Vehicles

Global Passenger Cars Friction Material Market, Segmentation by Application:

OEM

Aftermarket

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

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