

Global Carbon-Carbon Composite Brake Discs Market Growth 2026-2032

<https://marketpublishers.com/r/G8E9CC9AE31CEN.html>

Date: July 2026

Pages: 144

Price: US\$ 3,660.00 (Single User License)

ID: G8E9CC9AE31CEN

Abstracts

The global Carbon-Carbon Composite Brake Discs market size is predicted to grow from US\$ 1291 million in 2025 to US\$ 1926 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'Carbon-Carbon Composite Brake Discs Industry Forecast' looks at past sales and reviews total world Carbon-Carbon Composite Brake Discs sales in 2025, providing a comprehensive analysis by region and market sector of projected Carbon-Carbon Composite Brake Discs sales for 2026 through 2032. With Carbon-Carbon Composite Brake Discs sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Carbon-Carbon Composite Brake Discs industry.

This Insight Report provides a comprehensive analysis of the global Carbon-Carbon Composite Brake Discs landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Carbon-Carbon Composite Brake Discs portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Carbon-Carbon Composite Brake Discs market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Carbon-Carbon Composite Brake Discs and breaks down the forecast by Product Form, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Carbon-Carbon Composite Brake Discs.

This report presents a comprehensive overview, market shares, and growth opportunities of Carbon-Carbon Composite Brake Discs market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Form:

Brake Disc / Rotor

Stator / Pressure Plate

Carbon Heat Sink / Heat Pack

Other

Segmentation by Supply Route:

OEM Line-fit

Certified Aftermarket / PMA

Military Programme Supply

Racing

Other

Segmentation by Technology Route:

CVI / CVD-densified C/C

Liquid Impregnation Carbonised C/C

Hybrid Densification C/C

Other

Segmentation by Application:

Commercial Aircraft

Military Aircraft

Motorsport

High-energy Braking

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Carbon-Carbon Composite Brake Discs market?

What factors are driving Carbon-Carbon Composite Brake Discs market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Carbon-Carbon Composite Brake Discs market opportunities vary by end market size?

How does Carbon-Carbon Composite Brake Discs break out by Product Form, by Application?

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