

# **Automotive Brake Pads Market Assessment, By Material [Semi-Metallic, Non-Asbestos Organic, Low-Metallic, Others], By Position Type [Rear, Front], By Sales Channel [OEM, Aftermarket], By Vehicle Type [Passenger Vehicle, Commercial Vehicle, Others], By Region, Opportunities and Forecast, 2017-2031F**

<https://marketpublishers.com/r/A11176AAE49AEN.html>

Date: March 2025

Pages: 233

Price: US\$ 4,500.00 (Single User License)

ID: A11176AAE49AEN

## **Abstracts**

The global automotive brake pads market is projected to witness a CAGR of 6.42% during the forecast period 2024-2031, growing from USD 6.6 billion in 2023 to USD 10.86 billion in 2031. The automotive industry is transitioning with new power trains coming into existence. The advent of electric vehicles (EVs), new propulsion technology, and compatible transmission systems are expanding market growth. Braking technology is one of the crucial parts of any automobile, and hence, the braking pads are also advancing with time. The new brake pad technology works toward increasing the pad's coefficient of friction to improve braking.

Different passenger and commercial vehicles use various materials for brake pads according to the vehicle compliance and needs. The latest market trends involve building brake pads that can be delivered to any world region without changing the basic structure. Application of different materials in building brake pads, along with the advent of hybrid high-performance non-asbestos organic pads, are providing market momentum. Additionally, the leading market players are focusing on reducing environmental decay and bringing sustainability to the market base.

In July 2023, Tenneco's Ferodo OE braking launched copper-free hybrid friction material composites to improve the braking performance. This comprises low steel (LS) and non-asbestos organic (NAO) in one brake pad. The brake pad system is to serve

internal combustion engine (ICE) and EVs.

### Higher Demand for Eco-friendly and Low-dust Brake Pads to Fuel the Market Growth

The incompatible braking system and the end user's driving style are the real cause of brake dust. The ceramic brake pads are known for creating less dust, but other factors still affect the dust entering the brake system. Hence, brake pad developers are giving the option to end users to find the right brake pads that will create the least dust on their vehicle. The manufacturers target the right compatibility between the rotors and brake pads. Furthermore, the higher demand for eco-friendly brake pads has also increased. Using recycled materials to build sustainable brake pads is expected to increase the overall demand for automotive brake pads. The high fiction material composites enable outstanding braking solutions.

In October 2023, Brembo launched eco-friendly Greenance Kit. Greenance Kit offers a new combination of innovative alloy discs and specially designed brake pads, adding a new dimension to Brembo's Aftermarket range. This is a direct result of the company's rich heritage and experience and its unwavering commitment to innovation in the racing/motorsports and OEM markets.

### Usage of Sintered Metal and Advent of EV Vehicles to Transform the Market Dynamics

The sintered brake pads are recently designed for aggressive riding and longer shelf life. The advent of sintered has replaced the organic disc brake in two-wheelers and four-wheelers. While organic brake pads are generally made up of binding Kevlar, rubber, and silica, the higher demand for sintered metal pads is due to their long-lasting shelf life and anti-glazing properties. The high performance of sintered braking pads in extremely wet and dirty conditions also makes them a trend in the market. Extended research and development (R&D) are also done by braking technology giants to test vehicle compatibility, end-user comfort, and minimal dust intake for clean wheels.

Just like other similar components between EVs and gas-powered vehicles, brakes exist in EVs as well. Electric vehicles use regenerative braking that transforms the kinetic energy of a car into electric energy to deliver power to the car battery. EV brake pads also last much longer than those of ICE vehicles. In March 2023, Brakes India Pvt. Ltd., introduced "ZAP brake pads", specially designed for electric vehicles with enhanced corrosion protection and consistent stopping power.

### Government Compliance and Regulations Acting as Catalyst

Government concerns over automotive braking systems has increased as defective braking emerged as a leading cause of accidents. A data from Department of Transport of United Kingdom records 3,894 accidents in the country between 2013 and 2018 due to defective braking. The data supports the demand for an effective braking solution with improved brake pads. The government authorities for transport and road safety are also focusing on implementing strict rules and regulations for making automated braking systems mandatory in upcoming vehicles. Hence, these regulations and compliance standards are expected to propel the global automotive brake pads market.

In June 2023, the National Highway Traffic Safety Administration (NHTSA), Department of Transportation (DOT), proposed a Notice of Proposed Rulemaking (NPRM). This NPRM proposes the adoption of a new federal Motor Vehicle Safety Standard (FMSS) requiring AEB (Automatic Pedestrian Emergency Braking) and pedestrian AEB (pedestrian Electronic Braking) systems on light vehicles.

### Manufacturers to Move to Non-Asbestos Organic Material, While End Users Choose Ceramic

The non-asbestos organic (NAO) brake pad performs significantly better based on material type. The factors attributed to the segmental growth are organic braking and universal brake design. Other types of braking involve greater parts stocks, high storage costs, and broader logistical complexity. While the high-performance NAO, also known as “hybrid,” can be used globally. Non-asbestos organic pads deliver smoother and quieter braking experience. Another important segment in the material type category is ceramic brake pads which are the premium brake pads. The compatibility of these brake pads with hybrid and electric vehicles is phenomenal and is likely to replace other brake pads. EV manufacturers are also using these new ceramic brake pads to improve braking pads.

In November 2023, SBS A/S group launched its new low-steel (LS) brake compound. The dual application of these “Better Brakes” is designed to enhance the grip and advance the braking experience while elevating comfort. The company claims the boosted braking performance by 8.5%.

### Asia-Pacific Dominates Automotive Brake Pads Market

Asia-Pacific leads the market with higher manufacturing capacity and government regulations over braking technology. The local governments are trying to limit the

accidents occurring due to defective braking. The increasing sales of passenger and commercial vehicles in China and India are driving market growth. Higher adoption of EVs in the region are also driving regional growth. Additionally, local brake pad manufacturers are building lightweight and environment friendly products, which is favoring the market growth. Asia-Pacific is expected to be the fastest-growing automotive market in the next few years, as vehicle production and sales are on the rise in the region. Major countries, such as India, China, and Japan, have large-scale manufacturing facilities and robust supply chains, which will contribute to the growth of the market. A long list of local manufacturers like EBC brakes, Nissin Kogyo Co. Ltd, Haldex Group, Mando Corporation, Knorr-Bremse AG, and Akebono Brake Industry Co. Ltd. are operating and contributing significantly to the automotive brake pads market growth in Asia-Pacific.

From March 2023, Akebono brake pads are available in seven new part numbers from Akebono Brake CORP. These new parts add late-model brake pads to Akebono's ProACT ultra-premium disc brake pads line. The ProACT Ultra-premium disc brake pad is designed for Honda, Ford and Lincoln, and Toyota vehicles with a VIO (vehicle in operation) above 5 million.

#### Future Market Scenario (2024 – 2031F)

The advent of EVs with regenerative braking is expected to transform the market dynamics. New regenerative braking pads with ceramic material are also fueling the market growth.

Governments are adopting new policies to promote the usage of effective braking technology. These systems involve ABS, SBS, and other technologies. Usage of advanced material like sintered metal is likely to fuel market growth.

Standardizing brake pads and global NAO with enhanced anti-corrosion pad life NVH is likely to be a part of the future market trends.

#### Key Players Landscape and Outlook

Key participants in the automotive brake pads market focus on new strategies like developing vehicle-specific brake pads. The market players are collaborating and partnering to expand their market hold while strengthening their supply chain. The R&D programs are helping the brands produce better brake pads with less noise and lower

dust intake. The major players also try to adhere to the government compliance while keeping all sorts of brake pads in the system.

In April 2023, ZF Aftermarket by TRW launched two new products in India, namely TRW shock absorbers and TRW brake pads. Among these, TRW shock absorbers are manufactured in India, whereas TRW brakes pads are designed and tested using world-class techniques to ensure the highest quality in braking systems.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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