

# **Automotive Brake Components Aftermarket – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Disc Brakes and Drum Brakes), By Vehicle Type (Passenger Vehicles, Commercial Vehicles), By Sales Channel (Online and Offline), By Region, Competition, 2019-2029F**

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## **Abstracts**

The Global Automotive Brake Components Aftermarket size reached USD 33.74 Billion in 2023 and is expected to grow with a CAGR of 6.64% in the forecast period. The global automotive brake components aftermarket is a crucial segment of the automotive aftermarket industry, encompassing a wide range of brake-related parts and components. These include brake pads, brake shoes, rotors, calipers, and other essential elements that ensure the proper functioning of a vehicle's braking system. The aftermarket sector is characterized by the distribution and sale of these components as replacements or upgrades for original equipment in vehicles.

Several factors contribute to the growth and dynamics of the automotive brake components aftermarket. Firstly, the increasing global vehicle parc, combined with a growing awareness of vehicle safety, propels the demand for aftermarket brake components. As vehicles age, there is a natural need for brake system maintenance and replacements, driving the aftermarket industry.

Furthermore, the aftermarket benefits from the rising trend of vehicle customization and performance upgrades. Enthusiasts and car owners seeking enhanced braking performance often turn to aftermarket brake components, fostering a niche market for high-performance brake systems.

Additionally, regulatory changes and standards emphasizing vehicle safety and braking efficiency contribute to the aftermarket's significance. Stricter regulations regarding vehicle emissions and safety standards push both manufacturers and consumers to invest in high-quality brake components, whether for compliance or enhanced safety.

The competitive landscape of the global automotive brake components aftermarket involves various players, including traditional auto parts suppliers, independent aftermarket suppliers, and online retailers. E-commerce platforms play a growing role, providing consumers with convenient access to a wide range of brake components.

Challenges in the aftermarket include the presence of counterfeit or substandard products, emphasizing the importance of quality assurance and consumer education. The market's evolution is also influenced by technological advancements, such as the integration of electronic brake systems (EBS) and the growing interest in electric vehicles, which may impact the types of brake components in demand.

## Key Market Drivers

### Vehicle Aging and Maintenance Needs

A significant driver for the global automotive brake components aftermarket is the natural aging of vehicles, leading to increased maintenance and replacement requirements for brake components. As vehicles accumulate mileage, brake pads, rotors, and other braking system elements undergo wear and tear, necessitating aftermarket replacements. The expanding global vehicle parc, especially in mature automotive markets, contributes to sustained demand for aftermarket brake components.

### Emphasis on Vehicle Safety

A growing emphasis on vehicle safety standards globally serves as a key driver for the automotive brake components aftermarket. Stringent regulatory requirements and increased awareness of the importance of effective braking systems drive consumers and automotive professionals to prioritize high-quality aftermarket brake components. The aftermarket sector benefits from the continuous focus on enhancing safety features and compliance with evolving safety standards.

### Rising Customization Trends

The trend of vehicle customization, particularly among automotive enthusiasts and performance-oriented consumers, propels the demand for aftermarket brake components. Enthusiasts often seek upgraded and high-performance brake systems to improve stopping power, reduce brake fade, and enhance overall driving performance. The aftermarket market caters to this demand by offering a diverse range of performance-oriented brake components, including performance brake pads, rotors, and calipers.

### E-commerce and Online Retail Growth

The increasing prevalence of e-commerce and online retail channels significantly contributes to the growth of the automotive brake components aftermarket. Online platforms provide consumers with convenient access to a wide variety of brake components, enabling them to compare products, read reviews, and make informed purchasing decisions. The ease of online transactions and the ability to source products from global suppliers enhance the aftermarket's accessibility for consumers.

### Global Vehicle Fleet Expansion

The expansion of the global vehicle fleet, especially in emerging markets, fuels the demand for aftermarket brake components. As more vehicles enter the global automotive landscape, there is a corresponding increase in the need for replacement brake parts. The aftermarket sector benefits from this expansion, serving as a critical source for brake components that cater to a diverse range of vehicle makes and models.

### Technological Advancements in Brake Systems

Advancements in braking system technologies, such as electronic brake systems (EBS), anti-lock braking systems (ABS), and regenerative braking in electric vehicles, drive the demand for advanced aftermarket brake components. Consumers and fleet operators seek upgraded components that align with the latest technological innovations, influencing aftermarket offerings to include technologically advanced and efficient brake solutions.

### Urbanization and Traffic Congestion

Urbanization and the resulting increase in traffic congestion contribute to heightened

wear on brake systems. Stop-and-go traffic, common in urban environments, accelerates brake pad and rotor deterioration. This urban driving environment boosts the aftermarket's role as a crucial source for replacement components, addressing the wear and tear associated with frequent braking in congested traffic conditions.

### Consumer Awareness and Education

Growing consumer awareness regarding the importance of regular brake maintenance and the role of high-quality brake components in vehicle safety is a significant driver. Education campaigns by manufacturers, regulatory bodies, and industry stakeholders contribute to informed consumer choices, encouraging the adoption of aftermarket brake components for effective vehicle braking performance and overall safety.

### Key Market Challenges

#### Counterfeit and Substandard Products

A major challenge facing the global automotive brake components aftermarket is the prevalence of counterfeit and substandard products. The market is plagued by the influx of low-quality brake components that may compromise vehicle safety and performance. Identifying and mitigating the impact of counterfeit parts poses a significant challenge for consumers and aftermarket stakeholders, requiring robust quality control measures and heightened consumer awareness.

#### Complex Regulatory Landscape

The automotive brake components aftermarket operates in a complex regulatory environment, with varying safety standards and regulations across different regions. Adhering to diverse regulatory frameworks poses a challenge for aftermarket suppliers, distributors, and consumers alike. Ensuring compliance with evolving safety standards while navigating regional variations adds complexity and may result in increased costs for aftermarket participants.

#### Technological Complexity and Rapid Advancements

The rapid evolution of braking system technologies, including electronic advancements and integration of smart braking features, poses a challenge for aftermarket suppliers. Keeping up with the technological complexity of modern brake systems requires continuous innovation and adaptation. Aftermarket participants must invest in research

and development to offer components compatible with the latest braking technologies, balancing the need for innovation with cost considerations.

### Economic Uncertainties and Price Volatility

The global automotive brake components aftermarket is susceptible to economic uncertainties and fluctuations in raw material prices. Economic downturns may impact consumer spending on aftermarket products, affecting demand. Additionally, price volatility in materials such as steel and aluminum, essential for brake component manufacturing, can disrupt supply chains and influence pricing strategies, presenting challenges for aftermarket players in maintaining cost-effective offerings.

### Environmental Concerns and Regulatory Pressures

Increasing environmental concerns and regulations focused on sustainability impact the automotive industry, including the aftermarket. Disposal of used brake components, which may contain hazardous materials, poses environmental challenges. Compliance with environmental standards and regulations requires aftermarket stakeholders to adopt eco-friendly practices and invest in recycling and waste management solutions, adding operational complexities.

### Rise of Electric Vehicles (EVs)

The growing popularity of electric vehicles (EVs) presents a challenge for the traditional automotive brake components aftermarket. EVs often feature regenerative braking systems that reduce wear on traditional brake components. As the adoption of EVs increases, the demand for conventional brake components may decline, affecting aftermarket sales. Adapting to the evolving landscape of electric mobility becomes crucial for sustained aftermarket success.

### Limited Standardization in Aftermarket Parts

Unlike original equipment manufacturers (OEMs), the automotive brake components aftermarket faces challenges related to standardization. Aftermarket parts may vary in quality and specifications across different brands and suppliers. The absence of standardized aftermarket components complicates the selection process for consumers and contributes to concerns about part compatibility and performance.

### Customer Education and Trust

Educating consumers about the importance of brake maintenance and the selection of high-quality aftermarket components remains a persistent challenge. Establishing trust in aftermarket products requires effective communication about product quality, performance standards, and the safety aspects of brake components. Overcoming skepticism and building consumer confidence are ongoing challenges for aftermarket suppliers and distributors.

## Key Market Trends

### Rise of Electric Vehicles (EVs) and Advanced Braking Systems

A notable trend in the global automotive brake components aftermarket is the increasing prevalence of electric vehicles (EVs) and the adoption of advanced braking systems. EVs often incorporate regenerative braking technologies, impacting the wear and replacement patterns of traditional brake components. The aftermarket is witnessing a shift in demand towards specialized components compatible with regenerative braking systems, reflecting the evolving automotive landscape.

### Digitalization and E-commerce Growth

Digitalization has transformed the aftermarket landscape, with the growth of e-commerce platforms playing a pivotal role. Consumers increasingly prefer online channels for purchasing automotive brake components, driven by convenience, product availability, and the ability to compare prices and reviews. The digitalization trend is reshaping distribution channels, prompting aftermarket suppliers to enhance their online presence and streamline digital transactions.

### Focus on Sustainable and Eco-friendly Solutions

The automotive brake components aftermarket is experiencing a trend towards sustainability and eco-friendly solutions. As environmental consciousness grows, there is an increasing emphasis on recycling and environmentally responsible disposal of used brake components. Aftermarket suppliers are exploring greener manufacturing processes and materials, aligning with broader industry efforts to reduce the environmental impact of automotive products.

### Product Innovation and Performance Enhancement

In response to the demand for enhanced performance and customization, the aftermarket is witnessing a trend towards product innovation. Aftermarket suppliers are developing high-performance brake components, including performance brake pads, rotors, and calipers, catering to enthusiasts and consumers seeking improved braking capabilities. This trend aligns with the customization preferences of a segment of the automotive market.

### Increased Emphasis on Brake System Maintenance

A growing awareness of vehicle safety and the importance of regular maintenance is driving an increased emphasis on brake system upkeep. Consumers are recognizing the role of well-maintained brake components in ensuring overall vehicle safety. This trend is prompting aftermarket suppliers to focus on educational campaigns, promoting the benefits of preventive maintenance and the selection of high-quality replacement brake components.

### Expansion of Product Offerings and Diversification

The global automotive brake components aftermarket is witnessing a trend towards expanded product offerings and diversification. Aftermarket suppliers are broadening their portfolios to cover a wide range of vehicle makes and models. Diversification includes catering to both traditional internal combustion engine vehicles and the growing market of electric and hybrid vehicles, demonstrating adaptability to changing automotive trends.

### Integration of Data and Analytics

Advancements in data analytics are making an impact on the automotive brake components aftermarket. The integration of data-driven insights is helping aftermarket suppliers optimize inventory management, predict demand patterns, and enhance overall operational efficiency. The use of data analytics contributes to more informed decision-making and responsive strategies to meet evolving market demands.

### Collaborations and Partnerships in the Aftermarket Ecosystem

Collaborations and partnerships are emerging as a trend in the automotive brake components aftermarket ecosystem. Suppliers are engaging in strategic alliances with distributors, retailers, and e-commerce platforms to enhance market reach and improve the availability of products. Collaborative efforts enable aftermarket stakeholders to

leverage synergies, share expertise, and create a more robust and responsive aftermarket infrastructure.

## Segmental Insights

### By Product Type

The disc brakes segment is a pivotal category within the global automotive brake components aftermarket, representing a substantial portion of replacement and upgrade demands. Disc brakes have gained prominence due to their superior performance characteristics, including efficient heat dissipation and quicker response times. Aftermarket suppliers focus on providing a diverse range of disc brake components, such as brake pads, rotors, and calipers, catering to various vehicle makes and models. Consumers, particularly those seeking enhanced braking performance and responsiveness, often turn to aftermarket disc brake solutions. The trend towards high-performance and custom vehicles further fuels the demand for specialized disc brake components, contributing to the growth and dynamism of this segment within the aftermarket.

While disc brakes dominate in terms of performance, the drum brakes segment remains a significant component of the automotive brake components aftermarket. Drum brakes are commonly found in various vehicle types, especially in rear braking systems. Aftermarket suppliers address the maintenance and replacement needs of drum brake systems by offering brake shoes, drums, and related components. While drum brakes may be perceived as conventional compared to disc brakes, they continue to be prevalent, particularly in certain vehicle classes and applications. The aftermarket for drum brakes caters to a wide range of vehicles, including compact cars, trucks, and commercial vehicles. The availability of cost-effective and reliable aftermarket drum brake components ensures the continued relevance of this segment, providing consumers with choices based on their specific vehicle requirements and preferences.

## Regional Insights

North America, the automotive brake components aftermarket is characterized by a mature market with a strong emphasis on safety and performance. Disc brakes dominate the replacement landscape, reflecting consumer preferences for superior braking capabilities. The region's well-established distribution channels, including a robust network of auto parts retailers and online platforms, contribute to the accessibility of aftermarket brake components. Additionally, a growing trend toward customization



and performance upgrades fuels demand for high-quality disc brake components. Drum brakes also maintain a presence, particularly in certain vehicle segments. The North American aftermarket landscape is shaped by a combination of consumer awareness, stringent safety standards, and the influence of technological advancements in braking systems.

In Europe, the automotive brake components aftermarket is influenced by a diverse automotive landscape that includes a high prevalence of luxury and performance vehicles. Disc brakes, known for their efficiency and performance, dominate the replacement market, with consumers often seeking upgraded and high-performance solutions. The region's strong focus on sustainability extends to the aftermarket, with a growing demand for eco-friendly brake components. Drum brakes continue to be relevant, especially in cost-conscious segments. The aftermarket in Europe benefits from a well-established logistics network and a consumer base that values both safety and advanced technological features in replacement brake components.

The Asia-Pacific region exhibits a dynamic automotive brake components aftermarket driven by the rapid growth of the automotive industry. In this diverse market, disc brakes are in high demand, particularly in countries with a strong focus on technology and performance. The increasing vehicle parc and a rising middle-class population contribute to the aftermarket's growth. E-commerce platforms play a significant role, providing consumers with convenient access to a wide range of aftermarket brake components. Drum brakes maintain significance, especially in emerging markets with a preference for affordable and reliable solutions. The Asia-Pacific aftermarket is characterized by a blend of technological advancements, affordability considerations, and a growing awareness of safety standards.

The Middle East and Africa witness a steady but evolving automotive brake components aftermarket. Disc brakes dominate in luxury vehicles found in the affluent Middle Eastern markets, where consumers seek high-performance solutions. In Africa, the market is characterized by a mix of affordability and durability, driving demand for both disc and drum brake components in passenger cars. Commercial vehicles in the Middle East often prioritize robust drum brake systems for their reliability in challenging conditions. The aftermarket landscape in these regions is influenced by climatic considerations, with a focus on durable components that can withstand varying environmental conditions.

## Key Market Players

Akebono Brake Industry Co. Ltd.

ABS Friction Inc

Baer Inc.

BorgWarner Inc.

Brembo SpA

Carlisle Companies Inc.

Continental AG

Disc Brakes Australia Pty. Ltd.

First Brands Group

Freeman Automotive UK Ltd.

Report Scope:

In this report, the Global Automotive Brake Components Aftermarket has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automotive Brake Components Aftermarket, By Product Type:

oDisc Brakes

oDrum Brakes

Automotive Brake Components Aftermarket,By Vehicle Type:

oPassenger Vehicles

oCommercial Vehicles

Automotive Brake Components Aftermarket,By Sales Channel:

oOnline

oOffline

Automotive Brake Components Aftermarket, By Region:

oNorth America

United States

Canada

Mexico

oEurope CIS

Germany

Spain

France

Russia

Italy

United Kingdom

Belgium

oAsia-Pacific

China

India

Japan

Indonesia

Thailand

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

Turkey

Iran

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Automotive Brake Components Aftermarket.

Available Customizations:

Global Automotive Brake Components Aftermarket report with the given market data,

*Automotive Brake Components Aftermarket – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segm...*

TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

### **1.INTRODUCTION**

- 1.1.Product Overview
- 1.2.Key Highlights of the Report
- 1.3.Market Coverage
- 1.4.Market Segments Covered
- 1.5.Research Tenure Considered

### **2.RESEARCH METHODOLOGY**

- 2.1.Objective of theStudy
- 2.2.Baseline Methodology
- 2.3.Key Industry Partners
- 2.4.Major Association and Secondary Sources
- 2.5.Forecasting Methodology
- 2.6.Data Triangulation Validation
- 2.7.Assumptions and Limitations

### **3.EXECUTIVE SUMMARY**

- 3.1.
- 3.2.Market Forecast
- 3.3.Key Regions
- 3.4.Key Segments

### **4.IMPACT OF COVID-19 ON GLOBAL AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET**

### **5.GLOBAL AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

- 5.1.Market Size Forecast
  - 5.1.1.By Value
- 5.2.Market Share Forecast
  - 5.2.1.By Product Type Market Share Analysis (Disc Brakes and Drum Brakes)
  - 5.2.2.By Vehicle Type Market Share Analysis (Passenger Vehicles, Commercial Vehicles)
  - 5.2.3.By Sales Channel Market Share Analysis (Online and Offline)

- 5.2.4. By Regional Market Share Analysis
  - 5.2.4.1. Asia-Pacific Market Share Analysis
  - 5.2.4.2. Europe CIS Market Share Analysis
  - 5.2.4.3. North America Market Share Analysis
  - 5.2.4.4. South America Market Share Analysis
  - 5.2.4.5. Middle East Africa Market Share Analysis
- 5.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2023)
- 5.3. Global Automotive Brake Components Aftermarket Mapping Opportunity Assessment
  - 5.3.1. By Product Type Market Mapping Opportunity Assessment
  - 5.3.2. By Vehicle Type Market Mapping Opportunity Assessment
  - 5.3.3. By Sales Channel Market Mapping Opportunity Assessment
  - 5.3.4. By Regional Market Mapping Opportunity Assessment

## **6. ASIA-PACIFIC AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

- 6.1. Market Size Forecast
  - 6.1.1. By Value
- 6.2. Market Share Forecast
  - 6.2.1. By Product Type Market Share Analysis
  - 6.2.2. By Vehicle Type Market Share Analysis
  - 6.2.3. By Sales Channel Market Share Analysis
  - 6.2.4. By Country Market Share Analysis
    - 6.2.4.1. China Market Share Analysis
    - 6.2.4.2. India Market Share Analysis
    - 6.2.4.3. Japan Market Share Analysis
    - 6.2.4.4. Indonesia Market Share Analysis
    - 6.2.4.5. Thailand Market Share Analysis
    - 6.2.4.6. South Korea Market Share Analysis
    - 6.2.4.7. Australia Market Share Analysis
    - 6.2.4.8. Rest of Asia-Pacific Market Share Analysis
- 6.3. Asia-Pacific: Country Analysis
  - 6.3.1. China Automotive Brake Components Aftermarket Outlook
    - 6.3.1.1. Market Size Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share Forecast
      - 6.3.1.2.1. By Product Type Market Share Analysis
      - 6.3.1.2.2. By Vehicle Type Market Share Analysis

- 6.3.1.2.3.By Sales Channel MarketShare Analysis
- 6.3.2.India Automotive Brake Components Aftermarket Outlook
  - 6.3.2.1.Market Size Forecast
    - 6.3.2.1.1.By Value
  - 6.3.2.2.Market Share Forecast
    - 6.3.2.2.1.By Product Type Market Share Analysis
    - 6.3.2.2.2.By Vehicle Type Market Share Analysis
    - 6.3.2.2.3.By Sales Channel MarketShare Analysis
- 6.3.3.Japan Automotive Brake Components Aftermarket Outlook
  - 6.3.3.1.Market Size Forecast
    - 6.3.3.1.1.By Value
  - 6.3.3.2.Market Share Forecast
    - 6.3.3.2.1.By Product Type Market Share Analysis
    - 6.3.3.2.2.By Vehicle Type Market Share Analysis
    - 6.3.3.2.3.By Sales Channel MarketShare Analysis
- 6.3.4.Indonesia Automotive Brake Components Aftermarket Outlook
  - 6.3.4.1.Market Size Forecast
    - 6.3.4.1.1.By Value
  - 6.3.4.2.Market Share Forecast
    - 6.3.4.2.1.By Product Type Market Share Analysis
    - 6.3.4.2.2.By Vehicle Type Market Share Analysis
    - 6.3.4.2.3.By Sales Channel Market Share Analysis
- 6.3.5.Thailand Automotive Brake Components Aftermarket Outlook
  - 6.3.5.1.Market Size Forecast
    - 6.3.5.1.1.By Value
  - 6.3.5.2.Market Share Forecast
    - 6.3.5.2.1.ByProduct TypeMarket Share Analysis
    - 6.3.5.2.2.By Vehicle Type Market Share Analysis
    - 6.3.5.2.3.By Sales Channel Market Share Analysis
- 6.3.6.South Korea Automotive Brake Components Aftermarket Outlook
  - 6.3.6.1.Market Size Forecast
    - 6.3.6.1.1.By Value
  - 6.3.6.2.Market Share Forecast
    - 6.3.6.2.1.By Product Type Market Share Analysis
    - 6.3.6.2.2.By Vehicle Type Market Share Analysis
    - 6.3.6.2.3.By Sales Channel Market Share Analysis
- 6.3.7.Australia Automotive Brake Components Aftermarket Outlook
  - 6.3.7.1.Market Size Forecast
    - 6.3.7.1.1.By Value



#### 6.3.7.2. Market Share Forecast

6.3.7.2.1. By Product Type Market Share Analysis

6.3.7.2.2. By Vehicle Type Market Share Analysis

6.3.7.2.3. By Sales Channel Market Share Analysis

## **7. EUROPE CIS AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

### 7.1. Market Size Forecast

7.1.1. By Value

### 7.2. Market Share Forecast

7.2.1. By Product Type Market Share Analysis

7.2.2. By Vehicle Type Market Share Analysis

7.2.3. By Sales Channel Market Share Analysis

7.2.4. By Country Market Share Analysis

7.2.4.1. Germany Market Share Analysis

7.2.4.2. Spain Market Share Analysis

7.2.4.3. France Market Share Analysis

7.2.4.4. Russia Market Share Analysis

7.2.4.5. Italy Market Share Analysis

7.2.4.6. United Kingdom Market Share Analysis

7.2.4.7. Belgium Market Share Analysis

7.2.4.8. Rest of Europe CIS Market Share Analysis

### 7.3. Europe CIS: Country Analysis

7.3.1. Germany Automotive Brake Components Aftermarket Outlook

7.3.1.1. Market Size Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share Forecast

7.3.1.2.1. By Product Type Market Share Analysis

7.3.1.2.2. By Vehicle Type Market Share Analysis

7.3.1.2.3. By Sales Channel Market Share Analysis

7.3.2. Spain Automotive Brake Components Aftermarket Outlook

7.3.2.1. Market Size Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share Forecast

7.3.2.2.1. By Product Type Market Share Analysis

7.3.2.2.2. By Vehicle Type Market Share Analysis

7.3.2.2.3. By Sales Channel Market Share Analysis

7.3.3. France Automotive Brake Components Aftermarket Outlook

7.3.3.1. Market Size Forecast

- 7.3.3.1.1.By Value
- 7.3.3.2.Market Share Forecast
  - 7.3.3.2.1.By Product Type Market Share Analysis
  - 7.3.3.2.2.By Vehicle Type Market Share Analysis
  - 7.3.3.2.3.By Sales Channel Market Share Analysis
- 7.3.4.Russia Automotive Brake Components Aftermarket Outlook
  - 7.3.4.1.Market Size Forecast
    - 7.3.4.1.1.By Value
  - 7.3.4.2.Market Share Forecast
    - 7.3.4.2.1.By Product Type Market Share Analysis
    - 7.3.4.2.2.By Vehicle Type Market Share Analysis
    - 7.3.4.2.3.By Sales Channel Market Share Analysis
- 7.3.5.Italy Automotive Brake Components Aftermarket Outlook
  - 7.3.5.1.Market Size Forecast
    - 7.3.5.1.1.By Value
  - 7.3.5.2.Market Share Forecast
    - 7.3.5.2.1.By Product Type Market Share Analysis
    - 7.3.5.2.2.By Vehicle Type Market Share Analysis
    - 7.3.5.2.3.By Sales Channel Market Share Analysis
- 7.3.6.United Kingdom Automotive Brake Components Aftermarket Outlook
  - 7.3.6.1.Market Size Forecast
    - 7.3.6.1.1.By Value
  - 7.3.6.2.Market Share Forecast
    - 7.3.6.2.1.By Product Type Market Share Analysis
    - 7.3.6.2.2.By Vehicle Type Market Share Analysis
    - 7.3.6.2.3.By Sales Channel Market Share Analysis
- 7.3.7.Belgium Automotive Brake Components Aftermarket Outlook
  - 7.3.7.1.Market Size Forecast
    - 7.3.7.1.1.By Value
  - 7.3.7.2.Market Share Forecast
    - 7.3.7.2.1.By Product Type Market Share Analysis
    - 7.3.7.2.2.By Vehicle Type Market Share Analysis
    - 7.3.7.2.3.By Sales Channel Market Share Analysis

## **8.NORTH AMERICA AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

- 8.1.Market Size Forecast
  - 8.1.1.By Value

## 8.2. Market Share Forecast

- 8.2.1. By Product Type Market Share Analysis
- 8.2.2. By Vehicle Type Market Share Analysis
- 8.2.3. By Sales Channel Market Share Analysis
- 8.2.4. By Country Market Share Analysis
  - 8.2.4.1. United States Market Share Analysis
  - 8.2.4.2. Mexico Market Share Analysis
  - 8.2.4.3. Canada Market Share Analysis

## 8.3. North America: Country Analysis

- 8.3.1. United States Automotive Brake Components Aftermarket Outlook
  - 8.3.1.1. Market Size Forecast
    - 8.3.1.1.1. By Value
  - 8.3.1.2. Market Share Forecast
    - 8.3.1.2.1. By Product Type Market Share Analysis
    - 8.3.1.2.2. By Vehicle Type Market Share Analysis
    - 8.3.1.2.3. By Sales Channel Market Share Analysis
- 8.3.2. Mexico Automotive Brake Components Aftermarket Outlook
  - 8.3.2.1. Market Size Forecast
    - 8.3.2.1.1. By Value
  - 8.3.2.2. Market Share Forecast
    - 8.3.2.2.1. By Product Type Market Share Analysis
    - 8.3.2.2.2. By Vehicle Type Market Share Analysis
    - 8.3.2.2.3. By Sales Channel Market Share Analysis
- 8.3.3. Canada Automotive Brake Components Aftermarket Outlook
  - 8.3.3.1. Market Size Forecast
    - 8.3.3.1.1. By Value
  - 8.3.3.2. Market Share Forecast
    - 8.3.3.2.1. By Product Type Market Share Analysis
    - 8.3.3.2.2. By Vehicle Type Market Share Analysis
    - 8.3.3.2.3. By Sales Channel Market Share Analysis

## **9. SOUTH AMERICA AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

### 9.1. Market Size Forecast

- 9.1.1. By Value

### 9.2. Market Share Forecast

- 9.2.1. By Product Type Market Share Analysis
- 9.2.2. By Vehicle Type Market Share Analysis

- 9.2.3.By Sales Channel Market Share Analysis
- 9.2.4.By Country Market Share Analysis
  - 9.2.4.1.Brazil Market Share Analysis
  - 9.2.4.2.Argentina Market Share Analysis
  - 9.2.4.3.Colombia Market Share Analysis
  - 9.2.4.4.Rest of South America Market Share Analysis
- 9.3.South America: Country Analysis
  - 9.3.1.Brazil Automotive Brake Components Aftermarket Outlook
    - 9.3.1.1.Market Size Forecast
      - 9.3.1.1.1.By Value
    - 9.3.1.2.Market Share Forecast
      - 9.3.1.2.1.By Product Type Market Share Analysis
      - 9.3.1.2.2.By Vehicle Type Market Share Analysis
      - 9.3.1.2.3.By Sales Channel Market Share Analysis
  - 9.3.2.Colombia Automotive Brake Components Aftermarket Outlook
    - 9.3.2.1.Market Size Forecast
      - 9.3.2.1.1.By Value
    - 9.3.2.2.Market Share Forecast
      - 9.3.2.2.1.By Product Type Market Share Analysis
      - 9.3.2.2.2.By Vehicle Type Market Share Analysis
      - 9.3.2.2.3.By Sales Channel Market Share Analysis
  - 9.3.3.Argentina Automotive Brake Components Aftermarket Outlook
    - 9.3.3.1.Market Size Forecast
      - 9.3.3.1.1.By Value
    - 9.3.3.2.Market Share Forecast
      - 9.3.3.2.1.By Product Type Market Share Analysis
      - 9.3.3.2.2.By Vehicle Type Market Share Analysis
      - 9.3.3.2.3.By Sales Channel Market Share Analysis

## **10.MIDDLE EAST AFRICA AUTOMOTIVE BRAKE COMPONENTS AFTERMARKET OUTLOOK**

- 10.1.Market Size Forecast
  - 10.1.1.By Value
- 10.2.Market Share Forecast
  - 10.2.1.By Product Type Market Share Analysis
  - 10.2.2.By Vehicle Type Market Share Analysis
  - 10.2.3.By Sales Channel Market Share Analysis
  - 10.2.4.By Country Market Share Analysis

- 10.2.4.1.Turkey Market Share Analysis
- 10.2.4.2.Iran Market Share Analysis
- 10.2.4.3.Saudi Arabia Market Share Analysis
- 10.2.4.4.UAE Market Share Analysis
- 10.2.4.5.Rest of Middle East Africa Market ShareAnalysis
- 10.3.Middle East Africa: Country Analysis
  - 10.3.1.Turkey Automotive Brake Components Aftermarket Outlook
    - 10.3.1.1.Market Size Forecast
      - 10.3.1.1.1.By Value
    - 10.3.1.2.Market Share Forecast
      - 10.3.1.2.1.By Product Type Market Share Analysis
      - 10.3.1.2.2.By Vehicle Type Market Share Analysis
      - 10.3.1.2.3.By Sales Channel Market Share Analysis
  - 10.3.2.Iran Automotive Brake Components Aftermarket Outlook
    - 10.3.2.1.Market Size Forecast
      - 10.3.2.1.1.By Value
    - 10.3.2.2.Market Share Forecast
      - 10.3.2.2.1.By Product Type Market Share Analysis
      - 10.3.2.2.2.By Vehicle Type Market Share Analysis
      - 10.3.2.2.3.By Sales Channel Market Share Analysis
  - 10.3.3.Saudi Arabia Automotive Brake Components Aftermarket Outlook
    - 10.3.3.1.Market Size Forecast
      - 10.3.3.1.1.By Value
    - 10.3.3.2.Market Share Forecast
      - 10.3.3.2.1.By Product Type Market Share Analysis
      - 10.3.3.2.2.By Vehicle Type Market Share Analysis
      - 10.3.3.2.3.By Sales Channel Market Share Analysis
  - 10.3.4.UAE Automotive Brake Components Aftermarket Outlook
    - 10.3.4.1.Market Size Forecast
      - 10.3.4.1.1.By Value
    - 10.3.4.2.Market Share Forecast
      - 10.3.4.2.1.By Product Type Market Share Analysis
      - 10.3.4.2.2.By Vehicle Type Market Share Analysis
      - 10.3.4.2.3.By Sales Channel Market Share Analysis

## **11.SWOT ANALYSIS**

- 11.1.Strength
- 11.2.Weakness

11.3.Opportunities

11.4.Threats

## **12.MARKET DYNAMICS**

12.1.Market Drivers

12.2.Market Challenges

## **13.MARKET TRENDS AND DEVELOPMENTS**

## **14.COMPETITIVE LANDSCAPE**

14.1.Company Profiles (Up to 10 Major Companies)

14.1.1.Akebono Brake Industry Co. Ltd.

14.1.1.1.Company Details

14.1.1.2.Key Product Offered

14.1.1.3.Financials (As Per Availability)

14.1.1.4.Recent Developments

14.1.1.5.Key Management Personnel

14.1.2.ABS Friction Inc

14.1.2.1.Company Details

14.1.2.2.Key Product Offered

14.1.2.3.Financials (As Per Availability)

14.1.2.4.Recent Developments

14.1.2.5.Key Management Personnel

14.1.3.Baer Inc.

14.1.3.1.Company Details

14.1.3.2.Key Product Offered

14.1.3.3.Financials (As Per Availability)

14.1.3.4.Recent Developments

14.1.3.5.Key Management Personnel

14.1.4.BorgWarner Inc.

14.1.4.1.Company Details

14.1.4.2.Key Product Offered

14.1.4.3.Financials (As Per Availability)

14.1.4.4.Recent Developments

14.1.4.5.Key Management Personnel

14.1.5.Brembo SpA

14.1.5.1.Company Details

- 14.1.5.2.Key Product Offered
- 14.1.5.3.Financials (As Per Availability)
- 14.1.5.4.Recent Developments
- 14.1.5.5.Key Management Personnel
- 14.1.6.Carlisle Companies Inc.
  - 14.1.6.1.Company Details
  - 14.1.6.2.Key Product Offered
  - 14.1.6.3.Financials (As Per Availability)
  - 14.1.6.4.Recent Developments
  - 14.1.6.5.Key Management Personnel
- 14.1.7.Continental AG.
  - 14.1.7.1.Company Details
  - 14.1.7.2.Key Product Offered
  - 14.1.7.3.Financials (As Per Availability)
  - 14.1.7.4.Recent Developments
  - 14.1.7.5.Key Management Personnel
- 14.1.8.Disc Brakes Australia Pty. Ltd.
  - 14.1.8.1.Company Details
  - 14.1.8.2.Key Product Offered
  - 14.1.8.3.Financials (As Per Availability)
  - 14.1.8.4.Recent Developments
  - 14.1.8.5.Key Management Personnel
- 14.1.9.First Brands Group
  - 14.1.9.1.Company Details
  - 14.1.9.2.Key Product Offered
  - 14.1.9.3.Financials (As Per Availability)
  - 14.1.9.4.Recent Developments
  - 14.1.9.5.Key Management Personnel
- 14.1.10.Freeman Automotive UK Ltd.
  - 14.1.10.1.Company Details
  - 14.1.10.2.Key Product Offered
  - 14.1.10.3.Financials (As Per Availability)
  - 14.1.10.4.Recent Developments
  - 14.1.10.5.Key Management Personnel

## **15.STRATEGIC RECOMMENDATIONS**

- 15.1.Key Focus Areas
  - 15.1.1.Target Regions

15.1.2.Target Product Type

15.1.3.TargetVehicle Type

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