

# India Brake Pads, Shoes, and Linings Market By Vehicle Type (Two-Wheeler, Three-Wheeler, Passenger Car, Light Commercial Vehicle, Medium & heavy Commercial Vehicles), By Demand Category (OEM, Replacement), By Brake Type (Brake Pads, Brake Shoes, Brake Linings), By Region, Competition, Forecast & Opportunities, 2020-2030F

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## Abstracts

India Brake Pads, Shoes, and Linings Market was valued at USD 3.65 Billion in 2024 and is anticipated to project robust growth in the forecast period with a CAGR of 7.87% through 2029. The market for brake pads, shoes, and linings in India reflects a dynamic landscape driven by factors such as automotive industry growth, technological advancements, and regulatory changes. This segment plays a crucial role in vehicle safety and performance, influencing both consumer preferences and industry standards. India's automotive sector, one of the largest in the world, continues to expand with increasing vehicle production and sales across various categories including passenger vehicles, commercial vehicles, and two-wheelers. This growth directly impacts the demand for brake components like pads, shoes, and linings, as every vehicle requires these components for safe operation.

Technological advancements in manufacturing processes and materials have enhanced the performance and durability of brake pads, shoes, and linings. Manufacturers are continually innovating to improve braking efficiency, reduce noise, and enhance longevity, meeting the evolving demands of vehicle owners and regulatory standards. The regulatory landscape also plays a significant role in shaping the market dynamics. Regulatory requirements for vehicle safety, emissions, and performance standards influence the design and production of brake components. Compliance with these regulations is crucial for manufacturers to stay competitive in the market.

Consumer awareness about vehicle safety and maintenance has been rising steadily, prompting greater scrutiny of brake components. As a result, there is a growing preference for reliable and high-quality brake pads, shoes, and linings among vehicle owners and fleet operators.

The aftermarket segment for brake components is robust in India. Vehicle owners often replace brake pads, shoes, and linings periodically to ensure optimal braking performance and safety. This aftermarket demand creates opportunities for both domestic manufacturers and distributors.

### Key Market Drivers

#### Increasing Vehicle Production

One of the primary drivers of the India Brake Pads, Shoes, and Linings Market is the continuous growth in vehicle production. India is a major hub for automotive manufacturing, with numerous domestic and international automakers operating in the country. As vehicle production increases to meet domestic and international demand, the requirement for essential components like brake pads, shoes, and linings rises in tandem. This driver is intrinsically linked to the expansion of the automotive industry and the need to ensure the safety and performance of the vehicles produced.

#### Regular Maintenance and Replacement

The need for regular maintenance and replacement of braking components is another significant driver. Brake pads, shoes, and linings are critical for the safe and efficient operation of vehicles. As vehicles accrue mileage, these components experience wear and tear. Regular maintenance and timely replacement are essential to maintain optimal braking performance, ensure road safety, and comply with regulatory standards. This creates a consistent demand for these products within the aftermarket.

#### Stringent Regulatory Standards

Stringent regulatory standards and safety norms play a pivotal role in driving the India Brake Pads, Shoes, and Linings Market. Regulatory bodies impose strict guidelines and standards on the quality and performance of automotive braking systems. These regulations are designed to enhance road safety and ensure that vehicles meet specified braking requirements. As a result, automotive manufacturers must source high-quality brake components, creating a substantial and ongoing demand for brake pads, shoes, and linings that comply with these standards.

#### Rising Consumer Awareness

Increased consumer awareness of road safety and the importance of well-maintained brakes is a driver of market growth. Vehicle owners are becoming more conscious of the role that braking components play in their safety on the road. This heightened awareness prompts consumers to prioritize brake system maintenance and replacement, contributing to the market's expansion. Additionally, educated

consumers are more likely to choose high-quality brake components, creating opportunities for manufacturers.

#### Urbanization and Traffic Congestion

The ongoing urbanization of India and the resultant increase in traffic congestion contribute to the demand for reliable braking systems. In densely populated urban areas, vehicles frequently encounter stop-and-go traffic conditions, necessitating robust braking solutions. Brake pads, shoes, and linings must be able to withstand repetitive braking and deliver consistent performance under challenging circumstances. This driver reflects the importance of braking components in addressing the unique demands of urban driving.

#### Technological Advancements

Technological advancements in the design and materials used for brake pads, shoes, and linings are also driving market growth. Manufacturers are continually innovating to improve the durability, efficiency, and safety features of these components. This includes the development of advanced materials, such as ceramic and composite compounds, which offer better performance and longer service life. Technological progress enhances the overall quality of braking components and encourages consumers to invest in high-performance solutions, contributing to market expansion.

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#### Key Market Challenges

##### Counterfeit and Substandard Products

The proliferation of counterfeit and substandard brake components in the market poses a significant challenge. Counterfeit brake pads, shoes, and linings may not meet quality and safety standards, compromising the performance of the entire braking system. Consumers and vehicle owners often seek budget-friendly alternatives, unknowingly purchasing these subpar products. This not only jeopardizes road safety but also damages the reputation of legitimate manufacturers and distributors.

##### Economic Variability

The India Brake Pads, Shoes, and Linings Market is sensitive to economic fluctuations. Economic downturns and market uncertainties can lead to reduced vehicle production and sales. In such circumstances, consumers may postpone or avoid brake component replacement and maintenance, impacting the aftermarket segment of the market. Manufacturers and distributors need to navigate these economic variations by offering a range of price points and alternatives to cater to different consumer budgets.

##### Intense Price Competition

Intense price competition in the market is a substantial challenge. Brake pads, shoes, and linings are considered consumable parts, which means that consumers often seek

affordable options. This drives manufacturers to compete aggressively on pricing, potentially leading to cost-cutting measures. In some cases, cost-driven decisions may compromise the quality and safety of the products. Striking a balance between affordability and quality while maintaining competitiveness is an ongoing challenge for market players.

#### Environmental Regulations and Materials

Environmental regulations and concerns regarding the materials used in brake components present challenges in the India Brake Pads, Shoes, and Linings Market. Certain materials, such as asbestos, which were once common in brake linings, have been banned due to their harmful health and environmental effects. Compliance with these regulations necessitates the development and adoption of alternative materials. Finding eco-friendly and safe materials that also meet performance standards can be a complex endeavor for manufacturers.

#### Lack of Consumer Awareness

Limited consumer awareness about the importance of high-quality brake components is a challenge in the market. Many vehicle owners may not fully understand the significance of using genuine and quality brake pads, shoes, and linings. As a result, they may prioritize lower costs over safety and performance. Addressing this challenge requires educational efforts and awareness campaigns to inform consumers about the critical role of brakes in road safety and vehicle performance.

#### Technological Compatibility and Advancements

The rapid pace of technological advancements in the automotive industry presents a challenge in ensuring the compatibility of brake components with evolving vehicle technologies. As vehicles become more sophisticated and incorporate advanced features such as regenerative braking and autonomous driving systems, brake components need to adapt to these changes. Manufacturers must continually innovate to ensure that brake pads, shoes, and linings are compatible with the latest vehicle technologies while maintaining safety and performance standards.

#### Key Market Trends

##### Transition to Low-Metallic and Ceramic Materials

One notable trend in the India Brake Pads, Shoes, and Linings Market is the transition from traditional brake materials to low-metallic and ceramic options. These advanced materials offer several advantages, including reduced noise, improved heat dissipation, and enhanced braking performance. As consumers and manufacturers increasingly prioritize quieter and more efficient braking systems, the demand for low-metallic and ceramic brake components is on the rise. These materials are known for their ability to provide consistent braking performance while minimizing wear and tear on the brake system.

##### Emphasis on Environmentally Friendly Solutions

Environmental sustainability is a growing trend in the market, prompting manufacturers to develop eco-friendly brake components. Asbestos-free materials have become the standard in compliance with environmental regulations. Additionally, there is a focus on reducing the environmental impact of brake manufacturing processes, including the reduction of waste and the adoption of greener manufacturing practices. The market is witnessing the integration of recycled and sustainable materials in brake pads and linings, reflecting the industry's commitment to environmental responsibility.

#### Expansion of the Aftermarket Segment

The aftermarket segment of the India Brake Pads, Shoes, and Linings Market is expanding rapidly. Vehicle owners are becoming more aware of the importance of regular maintenance and timely replacement of brake components. This trend is driven by a desire for road safety and the need to comply with regulatory standards. As a result, the aftermarket is experiencing robust growth, with consumers actively seeking high-quality brake pads and linings. This expansion provides new opportunities for manufacturers and distributors in the aftermarket space.

#### Integration of Advanced Sensors and IoT Technology

Technological advancements are influencing the market, with the integration of advanced sensors and IoT (Internet of Things) technology into brake systems. These sensors monitor brake wear and performance, providing real-time data to both drivers and service centers. IoT technology enables predictive maintenance, allowing vehicle owners and technicians to anticipate when brake components need replacement. This trend is aligned with the broader adoption of smart and connected vehicle systems and contributes to enhanced vehicle safety and maintenance efficiency.

#### Customization and Personalization Options

The market is witnessing a trend toward customization and personalization of brake components. Vehicle owners, particularly in the aftermarket segment, seek the ability to tailor their brake systems to match their specific driving preferences. This includes options to select brake pad materials, coatings, and design features. Manufacturers are responding to this trend by offering a range of customization options, allowing consumers to create a brake system that aligns with their individual needs and driving styles.

#### Focus on Noise Reduction and Comfort

Noise reduction and overall driving comfort are important trends in the India Brake Pads, Shoes, and Linings Market. Consumers are increasingly sensitive to noise levels in their vehicles and seek quieter and smoother braking experiences. Manufacturers are investing in research and development to reduce brake noise, vibration, and harshness (NVH) levels. This includes the use of innovative friction materials and design enhancements aimed at enhancing the overall comfort of the

driving experience.

### Segmental Insights

#### Brake Type Insights

Brake pads are perhaps the most widely recognized component among consumers. They are crucial for converting kinetic energy into thermal energy by creating friction against the brake rotor. Brake pads are typically made from materials such as ceramic, semi-metallic, or organic compounds. Manufacturers continually innovate to improve pad longevity, reduce noise, and enhance braking efficiency, aligning with evolving consumer expectations and regulatory standards.

Brake shoes, on the other hand, are essential components in drum brake systems commonly found in older vehicles and certain segments of the market. They function by pressing against the brake drum to create friction, thereby slowing down or stopping the vehicle. Brake shoes are designed to withstand high temperatures and frictional forces, ensuring durability and reliability over extended periods of use.

Brake linings, though less commonly discussed, are integral to the braking system's performance. They are typically found in heavy-duty applications such as commercial vehicles and industrial machinery. Brake linings provide the frictional surface necessary to stop or slow down the vehicle, similar to brake pads and shoes. These linings are engineered to withstand intense heat and mechanical stress, making them critical for maintaining operational safety and efficiency in demanding environments.

#### Regional Insights

In the North region of India, the market for brake pads, shoes, and linings reflects a blend of urban and rural demand. This area benefits from its proximity to major manufacturing hubs and transportation networks, which bolster both production and consumption of automotive components. The northern region's economy, characterized by varied industries including agriculture, manufacturing, and services, drives steady demand for brake components across different vehicle segments.

The East region, the market dynamics are shaped by a combination of traditional industries and emerging economic activities. This region traditionally has a strong presence of agriculture and small-scale industries, alongside growing urban centers contributing to increased vehicle ownership. As a result, the demand for reliable brake pads, shoes, and linings remains robust, supported by a burgeoning automotive aftermarket and OEM sector catering to diverse consumer needs.

In the Western region of India, a distinct industrial and commercial landscape influences the brake components market. This area is known for its significant manufacturing clusters, including pharmaceuticals, textiles, and engineering goods. The automotive sector in the west benefits from these industrial linkages, driving demand for high-quality brake components across passenger, commercial, and industrial vehicle segments. Moreover, the western region's strategic ports and transportation networks

further facilitate the distribution and consumption of brake products.

The South region of India showcases a dynamic market environment driven by a mix of technology-driven industries and vibrant urban centers. With a strong presence of IT, manufacturing, and automotive sectors, the demand for advanced brake pads, shoes, and linings is substantial. The region's automotive aftermarket flourishes alongside original equipment manufacturers (OEMs), supported by a tech-savvy consumer base and robust infrastructure. This creates opportunities for innovation and product differentiation in the brake components market, catering to the evolving needs of vehicle owners and manufacturers alike.

#### Key Market Players

Rane Holdings Limited

ASK Automotive Limited

Sundaram Brake Linings Ltd

Brakes India Private Limited

Bosch Limited

Automotive Axles Limited

Hindustan Composites Limited

Allied Nippon Private Limited

Endurance Technologies Limited

Bharat Forge Ltd.

#### Report Scope:

In this report, the India Brake Pads, Shoes, and Linings Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Brake Pads, Shoes, and Linings Market, By Vehicle Type:

Two-Wheeler

Three-Wheeler

Passenger Car

Light Commercial Vehicle

Medium & heavy Commercial Vehicles

Brake Pads, Shoes, and Linings Market, By Demand Category:

OEM

Aftermarket

Brake Pads, Shoes, and Linings Market, By Brake Type:

Brake Pads

Brake Shoes

Brake Linings

Brake Pads, Shoes, and Linings Market, By Region:

North

East

West

South

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Brake Pads, Shoes, and Linings Market.

Available Customizations:

*India Brake Pads, Shoes, and Linings Market By Vehicle Type (Two-Wheeler, Three-Wheeler, Passenger Car, Light...*

India Brake Pads, Shoes, and Linings Market report with the given market data, 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. Market 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 the Study
- 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. Market Overview
- 3.2. Market Forecast
- 3.3. Key Regions
- 3.4. Key Segments

### **4. IMPACT OF COVID-19 ON INDIA BRAKE PADS, SHOES, AND LININGS MARKET**

### **5. VOICE OF CUSTOMER ANALYSIS**

- 5.1. Brand Awareness
- 5.2. Brand Satisfaction
- 5.3. Factors Affecting Purchase Decision

### **6. INDIA BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Volume & Value

## 6.2. Market Share & Forecast

6.2.1. By Vehicle Type Market Share Analysis (Two-Wheeler, Three-Wheeler, Passenger Car, Light Commercial Vehicle, Medium & heavy Commercial Vehicles)

6.2.2. By Demand Category Market Share Analysis (OEM, Replacement)

6.2.3. By Brake Type Market Share Analysis (Brake Pads, Brake Shoes, Brake Linings)

6.2.4. By Region Market Share Analysis

6.2.4.1. North Market Share Analysis

6.2.4.2. East Market Share Analysis

6.2.4.3. West Market Share Analysis

6.2.4.4. South Market Share Analysis

6.2.5. By Company Market Share Analysis (Top 5 Companies, Others - By Value, 2024)

## 6.3. India Brake Pads, Shoes, and Linings Market Mapping & Opportunity Assessment

6.3.1. By Vehicle Type Market Mapping & Opportunity Assessment

6.3.2. By Demand Category Market Mapping & Opportunity Assessment

6.3.3. By Brake Type Market Mapping & Opportunity Assessment

6.3.4. By Region Market Mapping & Opportunity Assessment

## 7. INDIA TWO-WHEELER BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK

### 7.1. Market Size & Forecast

7.1.1. By Volume & Value

### 7.2. Market Share & Forecast

7.2.1. By Demand Category Market Share Analysis

7.2.2. By Brake Type Market Share Analysis

## 8. INDIA THREE-WHEELER BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK

### 8.1. Market Size & Forecast

8.1.1. By Volume & Value

### 8.2. Market Share & Forecast

8.2.1. By Demand Category Market Share Analysis

8.2.2. By Brake Type Market Share Analysis

## 9. INDIA PASSENGER CARS BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK

## 9.1. Market Size & Forecast

### 9.1.1. By Volume & Value

## 9.2. Market Share & Forecast

### 9.2.1. By Demand Category Market Share Analysis

### 9.2.2. By Brake Type Market Share Analysis

## **10. INDIA LIGHT COMMERCIAL VEHICLES BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Volume & Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Demand Category Market Share Analysis

#### 10.2.2. By Brake Type Market Share Analysis

## **11. INDIA MEDIUM & HEAVY COMMERCIAL VEHICLE BRAKE PADS, SHOES, AND LININGS MARKET OUTLOOK**

### 11.1. Market Size & Forecast

#### 11.1.1. By Volume & Value

### 11.2. Market Share & Forecast

#### 11.2.1. By Demand Category Market Share Analysis

#### 11.2.2. By Brake Type Market Share Analysis

## **12. SWOT ANALYSIS**

### 12.1. Strength

### 12.2. Weakness

### 12.3. Opportunities

### 12.4. Threats

## **13. MARKET DYNAMICS**

### 13.1. Market Drivers

### 13.2. Market Challenges

## **14. MARKET TRENDS AND DEVELOPMENTS**

## 15. COMPETITIVE LANDSCAPE

### 15.1. Company Profiles (Up to 10 Major Companies)

#### 15.1.1. Rane Holdings Limited

##### 15.1.1.1. Company Details

##### 15.1.1.2. Key Product Offered

##### 15.1.1.3. Recent Developments

##### 15.1.1.4. Key Management Personnel

#### 15.1.2. ASK Automotive Limited

##### 15.1.2.1. Company Details

##### 15.1.2.2. Key Product Offered

##### 15.1.2.3. Recent Developments

##### 15.1.2.4. Key Management Personnel

#### 15.1.3. Sundaram Brake Linings Ltd

##### 15.1.3.1. Company Details

##### 15.1.3.2. Key Product Offered

##### 15.1.3.3. Recent Developments

##### 15.1.3.4. Key Management Personnel

#### 15.1.4. Brakes India Private Limited

##### 15.1.4.1. Company Details

##### 15.1.4.2. Key Product Offered

##### 15.1.4.3. Recent Developments

##### 15.1.4.4. Key Management Personnel

#### 15.1.5. Bosch Limited

##### 15.1.5.1. Company Details

##### 15.1.5.2. Key Product Offered

##### 15.1.5.3. Recent Developments

##### 15.1.5.4. Key Management Personnel

#### 15.1.6. Automotive Axles Limited

##### 15.1.6.1. Company Details

##### 15.1.6.2. Key Product Offered

##### 15.1.6.3. Recent Developments

##### 15.1.6.4. Key Management Personnel

#### 15.1.7. Hindustan Composites Limited

##### 15.1.7.1. Company Details

##### 15.1.7.2. Key Product Offered

##### 15.1.7.3. Recent Developments

##### 15.1.7.4. Key Management Personnel

#### 15.1.8. Allied Nippon Private Limited

- 15.1.8.1. Company Details
- 15.1.8.2. Key Product Offered
- 15.1.8.3. Recent Developments
- 15.1.8.4. Key Management Personnel
- 15.1.9. Endurance Technologies Limited
  - 15.1.9.1. Company Details
  - 15.1.9.2. Key Product Offered
  - 15.1.9.3. Recent Developments
  - 15.1.9.4. Key Management Personnel
- 15.1.10. Bharat Forge Ltd.
  - 15.1.10.1. Company Details
  - 15.1.10.2. Key Product Offered
  - 15.1.10.3. Recent Developments
  - 15.1.10.4. Key Management Personnel

## **16. STRATEGIC RECOMMENDATIONS**

- 16.1. Key Focus Areas
  - 16.1.1. Target Countries
  - 16.1.2. Target By Vehicle Type
  - 16.1.3. Target By Demand Category

## **17. ABOUT US & DISCLAIMER**

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