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India Two Wheeler Brake System Market By Vehicle Type (Motorcycle, Scooter & Moped), By Capacity Type (Less Than 100 cc, 101-150 cc, Above 151 cc), By Brake Type (Disc, Drum), By Region, Competition, Forecast and Opportunities, 2020-2030F 2020-2030F

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Abstracts

The India Two Wheeler Brake System market was valued at USD 1.29 Billion in 2024 and is expected to reach USD 2.01 Billion by 2030 with a CAGR of 7.62% during the forecast period. The India two-wheeler brake system market is experiencing robust growth due to increasing consumer awareness about vehicle safety, stringent government regulations mandating advanced braking technologies, and rising two-wheeler demand driving overall industry growth. For instance, In 2024, the Indian two-wheeler industry experienced robust growth during the festive season, driven by a strong revival in rural demand following favorable monsoon conditions. According to Aniruddha Haldar, Senior Vice President at TVS Motor Company, the industry recorded a 13% growth in the fiscal year, marking a significant improvement over previous years. Rural demand outpaced urban regions, signaling a positive shift for the sector. Additionally, scooters gained increasing acceptance in rural areas, further contributing to the overall growth in two-wheeler sales. The growing penetration of Anti-lock Braking Systems (ABS) in mid-range and premium motorcycles, driven by government safety norms, has significantly boosted the market. Increasing demand for two-wheelers, especially in urban and semi-urban areas, is further propelling the adoption of effective braking systems, as these vehicles serve as a primary mode of transportation for millions. Technological advancements, such as the integration of combined braking systems (CBS) in entry-level models, have also expanded the scope of the market.

The shift toward electric two-wheelers has created a new growth avenue for brake system manufacturers. Electric scooters and motorcycles require lightweight and

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efficient braking systems, driving innovations in regenerative braking and electronic brake force distribution. Consumer preference for vehicles equipped with features enhancing safety and riding comfort is pushing manufacturers to develop intelligent braking solutions. Partnerships between brake system providers and OEMs to integrate smart braking technologies are gaining traction. The adoption of disc brakes across lower-cost motorcycles, previously limited to premium models, is another significant trend contributing to market expansion.

Despite strong growth prospects, the market faces challenges such as price sensitivity among consumers in the economy segment, which limits the penetration of advanced brake systems. The cost associated with ABS and other advanced technologies poses a challenge for manufacturers aiming to cater to a broad audience. Intense competition among local and global players is driving cost optimization efforts, which can strain profit margins. However, increasing consumer focus on safety and the enforcement of stringent regulations are expected to outweigh these challenges, ensuring steady growth during the forecast period.

Market Drivers

Rising Awareness of Safety and Government Regulations

The increasing focus on road safety is a critical driver for the India two-wheeler brake system market. Consumers are prioritizing vehicles equipped with reliable braking systems to reduce accident risks. Government mandates, such as the implementation of Anti-lock Braking Systems (ABS) for motorcycles above 125cc and Combined Braking Systems (CBS) for lower-capacity two-wheelers, are pushing manufacturers to adopt advanced technologies. The regulations aim to enhance braking performance across all vehicle segments, ensuring safer mobility. Manufacturers are aligning their offerings with these mandates to stay competitive. This has led to a significant rise in the penetration of ABS and CBS systems. These factors collectively contribute to the growing adoption of advanced brake systems.

Expanding Two-Wheeler Ownership and Urbanization

The growing two-wheeler ownership, driven by urbanization and the need for affordable transportation, is fueling demand for efficient brake systems. As cities experience increased traffic congestion, consumers are opting for vehicles with better handling and braking efficiency to ensure safe commuting. The rise in disposable incomes and aspirational buying in urban and semi-urban regions has spurred demand for premium

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motorcycles with advanced braking technologies like disc brakes and ABS. For instance, as per the World bank, India is undergoing a rapid urban transformation, with projections indicating that by 2036, 600 million people will reside in urban areas, accounting for 40% of the population. This urban expansion is expected to contribute 75% of the nation's GDP by 2031. To manage this growth, the World Bank emphasizes the need for a comprehensive approach, including improved urban planning, enhanced municipal financing, and strengthened governance. Key recommendations include developing robust urban infrastructure, ensuring sustainable service delivery, and fostering economic opportunities to accommodate the increasing urban population. Two-wheelers remain a primary mode of transportation for last-mile connectivity, further emphasizing the importance of safety features. Manufacturers are increasingly integrating these systems into entry-level models, addressing the diverse needs of consumers. This trend is expected to drive steady market growth in the coming years.

Innovations in Braking Technology and Electrification

Technological advancements in braking systems are reshaping the market landscape. The growing adoption of electric two-wheelers has increased the need for lightweight and energy-efficient braking solutions. Innovations such as regenerative braking, electronic brake force distribution, and intelligent braking systems are gaining traction. These systems not only enhance safety but also improve the overall riding experience. Partnerships between original equipment manufacturers (OEMs) and brake system providers are driving the development of next-generation braking solutions. As disc brakes become increasingly common across various segments, manufacturers are also focusing on cost optimization without compromising quality. This wave of innovation is unlocking new growth opportunities in the evolving two-wheeler market.

Key Market Challenges

High Cost of Advanced Braking Systems

The high cost of advanced braking technologies, such as Anti-lock Braking Systems (ABS), poses a significant challenge in the India two-wheeler brake system market. Price-sensitive consumers in the economy segment often prioritize affordability over additional safety features. The integration of ABS or Combined Braking Systems (CBS) increases the overall cost of two-wheelers, making them less appealing to budget-conscious buyers. Manufacturers face pressure to balance cost-efficiency with compliance to safety regulations. The cost challenge is more pronounced in entry-level models where margins are already tight. This creates hurdles in achieving widespread

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adoption of advanced brake systems. Addressing this issue requires cost-optimization strategies and economies of scale.

Intense Competition and Market Fragmentation

The Indian two-wheeler brake system market is highly fragmented, with numerous domestic and international players competing for market share. This intense competition exerts downward pressure on pricing, impacting profitability for manufacturers. Established global players often have access to advanced technology and R&D resources, giving them an edge over smaller domestic manufacturers. Conversely, local players leverage their cost-effective production capabilities to target the economy segment. Such dynamics make it challenging for manufacturers to differentiate their products. Additionally, the competitive landscape limits the ability to pass on rising input costs to consumers. Sustaining profitability while offering innovative solutions remains a key challenge in this environment.

Limited Awareness Among Rural Consumers

Despite increasing awareness in urban areas, a significant portion of rural consumers remains unaware of the importance of advanced braking systems. Rural markets, which constitute a large share of two-wheeler sales, are driven primarily by affordability and basic functionality. The lack of emphasis on safety features among rural buyers slows the penetration of technologies like ABS and CBS in these regions. Manufacturers find it challenging to justify the higher costs of these systems in markets where price is the primary consideration. Additionally, limited access to financing options in rural areas further restricts the adoption of premium two-wheelers with advanced safety features. Bridging this awareness gap is critical for market expansion.

Key Market Trends

Increasing Adoption of Disc Brakes Across Segments

The adoption of disc brakes is expanding from premium motorcycles to entry-level and commuter segments, driven by a growing emphasis on safety and performance. Consumers are recognizing the superior braking efficiency and shorter stopping distances offered by disc brakes compared to traditional drum brakes. Manufacturers are introducing affordable disc brake systems in lower-priced models to cater to a wider audience. Government mandates for safety compliance further support this trend, ensuring that advanced braking solutions are integrated across various vehicle

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categories. The increasing use of lightweight materials in disc brake systems enhances performance without adding significant cost. This trend is contributing to the democratization of advanced braking technologies in the two-wheeler market. As a result, disc brakes are becoming a standard feature in many new models.

Rise of Smart and Regenerative Braking Systems

The two-wheeler brake system market is witnessing a shift toward intelligent braking solutions, such as regenerative braking and electronic brake force distribution. These systems are gaining popularity, particularly in electric two-wheelers, where energy recovery and efficient braking are critical. Regenerative braking enhances overall energy efficiency by converting kinetic energy into electrical energy, boosting battery life. Electronic brake force distribution improves stability and safety by automatically adjusting braking power between wheels based on road conditions. OEMs are collaborating with brake system providers to integrate these smart technologies into their offerings. Consumer demand for advanced features that enhance safety and riding experience is driving further innovation. The adoption of these technologies is set to redefine braking system standards in the coming years.

Technological Advancements in Anti-lock Braking Systems (ABS)

Technological advancements in Anti-lock Braking Systems (ABS) are shaping the evolution of the two-wheeler brake system market. Compact and cost-effective single-channel ABS solutions are becoming more prevalent in entry-level motorcycles, making the technology accessible to a larger audience. Dual-channel ABS is increasingly adopted in premium and mid-range models, offering enhanced safety and control during braking. Manufacturers are focusing on optimizing ABS design for better performance while reducing costs to cater to the price-sensitive Indian market. The integration of ABS in scooters is also gaining momentum, driven by urban consumers seeking safer and more reliable braking. These advancements not only ensure compliance with regulatory norms but also align with consumer preferences for safer riding experiences. The continuous development of ABS technology underscores its importance as a key market trend. For instance in 2023, Continental is set to introduce its new single-channel Anti-lock Braking System (ABS) in India, aimed at enhancing two-wheeler safety. The innovation is designed to offer cost-effective braking solutions for entry-level motorcycles. With growing demand for advanced safety technologies, Continental's move is expected to strengthen its position in the Indian market. The launch aligns with the country's evolving road safety standards and rising consumer preference for reliable braking systems.

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Segmental Insights

Capacity Type Insight

The India two-wheeler brake system market is segmented by capacity type into less than 100 cc, 101-150 cc, and above 151 cc categories. Two-wheelers with less than 100 cc engine capacity cater primarily to budget-conscious consumers and are popular for short-distance commuting, particularly in rural and semi-urban areas. These vehicles are typically equipped with basic braking systems, such as drum brakes, designed to provide sufficient stopping power for their lightweight frames and lower speeds. Despite their simplicity, these braking systems are critical for ensuring safety and reliability for users in this segment.

The 101-150 cc capacity segment represents a balance between performance and affordability. Two-wheelers in this category are favored by urban and suburban commuters for their versatility, fuel efficiency, and moderate power output. The braking systems in this segment often include a combination of front disc brakes and rear drum brakes, offering improved stopping power while maintaining cost-effectiveness. Increasing consumer awareness about road safety has driven the adoption of advanced braking technologies such as combined braking systems (CBS), which enhance overall safety by distributing braking force evenly across both wheels.

Vehicles with above 151 cc engine capacity are designed for higher performance and cater to enthusiasts, long-distance commuters, and premium segment buyers. These two-wheelers require more advanced braking systems to handle higher speeds and greater power output. Disc brakes are commonly used on both front and rear wheels in this segment, providing superior braking performance and heat dissipation. The inclusion of anti-lock braking systems (ABS) has become more prevalent, offering improved control and stability during sudden braking or on slippery surfaces. This segment also sees a growing emphasis on innovation in braking materials and design to enhance durability and efficiency.

Each capacity type within the two-wheeler market has distinct braking system requirements tailored to its specific use case, performance demands, and target consumer base. The evolution of braking technologies across these segments reflects the market's response to changing consumer preferences, regulatory standards, and safety concerns. This segmentation ensures that two-wheelers across all categories are equipped with appropriate braking solutions to meet the diverse needs of Indian riders

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while maintaining safety and performance standards.

Region Insights

In 2024, North India emerged as a dominant region in the two-wheeler brake system market. The region’s large population base, rapid urbanization, and increasing disposable income contributed significantly to the demand for two-wheelers, driving the need for efficient and advanced braking systems. The high density of manufacturing units and the growing number of two-wheeler sales in states such as Uttar Pradesh, Punjab, Haryana, and Delhi played a pivotal role in the expansion of the brake system market.

Motorcycles, which are highly popular in North India, account for a substantial share of the market. The demand for motorcycles in this region is primarily driven by their utility for both urban commuting and long-distance travel. As a result, motorcycle manufacturers are increasingly equipping their models with advanced braking systems, such as disc brakes, to meet safety requirements and consumer expectations for performance. The rising preference for higher-performance motorcycles has led to an increased adoption of technologies like anti-lock braking systems (ABS) and combined braking systems (CBS) in premium and mid-range segments.

Scooters also represent a key market segment in North India, particularly among urban commuters. The demand for scooters in cities like Delhi, Chandigarh, and Lucknow is fueled by their affordability, fuel efficiency, and ease of manoeuvring through congested streets. The adoption of braking systems in scooters has gradually shifted toward disc brakes in the front and rear, enhancing safety and stopping power, especially in the growing urban centers where road conditions can be challenging. The trend toward offering more advanced braking systems in scooters is expected to continue as the demand for higher-quality vehicles increases.

Mopeds, though less popular than motorcycles and scooters, still hold a significant market share in rural areas of North India. These vehicles are favoured for their lower cost and fuel efficiency. The braking systems in mopeds typically remain basic, with drum brakes being the preferred option. However, there has been a gradual move towards improving braking technology, driven by safety concerns and changing consumer preferences.

The dominance of North India in the two-wheeler brake system market in 2023 is also attributed to the region's well-established transportation infrastructure, increasing

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adoption of motorcycles and scooters, and growing awareness of road safety. As consumer demand for better braking systems continues to rise, North India remains a key market for innovation in two-wheeler safety technologies.

Key Market Players

Brembo N.V.

UNO Minda Limited

TVS Srichakra Limited

Robert Bosch GmbH

Rane Holdings Limited

Sundaram Clayton Limited

ZF Friedrichshafen AG

Endurance Technologies Limited

JJUAN, SAU

Akebono Brake Corporation

Report Scope:

In this report, the India Two Wheeler Brake System Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

India Two Wheeler Brake System Market, By Vehicle Type:

Motorcycle

Scooter & Moped

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India Two Wheeler Brake System Market, By Capacity Type:

Less Than 100 cc

101-150 cc

Above 151 cc

India Two Wheeler Brake System Market, By Brake Type:

Disc

Drum

India Two Wheeler Brake System Market, By Region:

North India

South India

West India

East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Two Wheeler Brake System Market.

Available Customizations:

India Two Wheeler Brake System 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).

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