

India Brake Pads, Shoes and Linings Market By Vehicle Type (Two-Wheeler, Passenger Car, Commercial Vehicles), By Sales Channel (OEM, Aftermarket), By Brake Type (Brake Pads, Brake Shoes, Brake Linings), By Region, Competition, Forecast & Opportunities, 2020-2030F

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Report description:

The India Brake Pads, Shoes and Linings market was valued at USD 1.07 Billion in 2024 and is expected to reach USD 1.45 Billion by 2030 with a CAGR of 5.14% during the forecast period. The India Brake Pads, Shoes, and Linings market is experiencing robust growth, driven by increasing vehicle production and rising consumer awareness about road safety. The surge in passenger and commercial vehicle sales, coupled with stringent government regulations on vehicle safety standards, has significantly boosted demand. The market caters to diverse segments, including passenger cars, two-wheelers, and heavy vehicles, supported by advancements in braking technologies. Furthermore, the growth of the automotive aftermarket and rising maintenance activities have contributed to the steady expansion of this market.

Key drivers include the growing penetration of electric and hybrid vehicles, which require advanced braking systems for enhanced performance. The shift toward disc brakes in vehicles is encouraging the adoption of high-performance brake pads and linings, offering better durability and reliability. Increasing investments in R&D are fueling innovations such as lightweight materials and ceramic-based brake components to improve efficiency. The automotive aftermarket presents substantial opportunities as vehicle owners prioritize periodic brake replacements to ensure optimal safety and performance. E-commerce platforms are further streamlining the availability of brake components, enhancing market accessibility for consumers.

Despite strong growth prospects, the market faces challenges, including the high costs of advanced brake technologies, which may limit their adoption in cost-sensitive segments. Intense competition among manufacturers and the presence of counterfeit products in the aftermarket can affect the profitability of established players. Raw material price volatility poses another challenge, impacting production costs and pricing strategies. However, the increasing consumer preference for quality and branded products offers opportunities for companies to differentiate themselves through superior offerings and warranties.

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Strategic collaborations between OEMs and component manufacturers are expected to address these challenges and drive market growth further.

Market Drivers

Rising Vehicle Production and Sales

The increasing production and sales of both passenger and commercial vehicles are major drivers for the brake pads, shoes, and linings market in India. As the automotive industry expands, the demand for reliable and efficient braking systems grows accordingly. The rise in disposable incomes and urbanization is also contributing to higher vehicle ownership rates. Furthermore, the rapid expansion of road infrastructure has spurred greater vehicle usage, driving the need for quality brake components. This growth is especially notable in the two-wheeler segment, where brake pads are a crucial safety feature. As manufacturers continue to focus on improving vehicle safety standards, the demand for advanced braking solutions is expected to increase significantly. The automotive aftermarket, driven by vehicle owners seeking replacement parts, is further propelling market growth. For instance, India's automotive industry saw significant growth in the 2022-23 fiscal year, with total vehicle production rising to 25.93 million units, up from 23.04 million the previous year. Domestic sales of passenger vehicles surged by 27%, with utility vehicles seeing a notable increase of 34%. Sales in the commercial vehicle segment grew by 34%, driven by a 49% rise in medium and heavy commercial vehicle sales. Meanwhile, exports showed mixed trends, with passenger vehicle exports rising but exports of three-wheelers and two-wheelers declining.

Growing Adoption of Electric and Hybrid Vehicles

The shift toward electric and hybrid vehicles is significantly impacting the brake pads, shoes, and linings market. These vehicles require advanced braking systems due to their unique performance characteristics, such as regenerative braking. Electric and hybrid vehicles' increasing market penetration in India has led to a demand for specialized brake components that provide improved efficiency and durability. Furthermore, the Indian government's push for green mobility through incentives and subsidies is accelerating the adoption of these vehicles. The rising number of electric vehicles (EVs) and hybrid vehicles on the road increases the need for innovative braking solutions. Brake systems in EVs are designed for higher energy efficiency, contributing to a growing demand for optimized brake pads and linings. The shift also opens new opportunities for manufacturers to introduce lightweight and high-performance components. For instance, In 2024, India's electric vehicle (EV) industry achieved a significant milestone, with sales increasing by 26.5% year-on-year to 1.94 million units, according to Vahan data from the Ministry of Road Transport and Highways. This growth elevated the country's EV penetration to 7.46%, up from 6.39% in 2023. Despite this progress, traditional petrol vehicles remain dominant, comprising 73.69% of the 26.04 million vehicles sold in 2024. The average number of petrol, diesel, CNG, or hybrid vehicles sold per EV improved to 12.43, compared to 15.67 in 2023 and 21.05 in 2022.

Technological Advancements in Braking Systems

Technological advancements in braking systems are a key driver of the brake pads, shoes, and linings market in India. The adoption of disc brakes over drum brakes in many vehicle segments is contributing to a higher demand for performance-oriented brake pads and linings. Innovations such as the use of ceramic materials, which offer superior heat resistance and longer lifespan, are gaining traction in the market. Manufacturers are also focusing on developing lighter materials to reduce the overall weight of vehicles, which directly impacts the design of brake components. As consumer awareness about vehicle safety rises, there is a growing preference for high-performance and durable brake parts. Moreover, advancements in braking systems like Anti-lock Braking System (ABS) and Electronic Stability Control (ESC) have created the need for more reliable and efficient brake pads. The trend towards enhanced braking technologies will continue to drive market demand.

Key Market Challenges

High Cost of Advanced Braking Technologies

The high cost of advanced braking technologies presents a significant challenge to the brake pads, shoes, and linings market in India. As vehicle manufacturers adopt newer, more efficient braking systems, the cost of producing brake components increases, making them less affordable for price-sensitive segments of the market. This is particularly problematic in the entry-level vehicle segment, where cost remains a crucial factor for consumers. Additionally, while advanced materials like ceramic and carbon fibre offer better performance, their higher price points limit their widespread adoption in lower-cost vehicles. Manufacturers are tasked with balancing performance and affordability to cater to a diverse consumer base. The challenge lies in finding cost-effective solutions without compromising on safety and efficiency. As a result, manufacturers must innovate to keep costs manageable.

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while meeting stringent performance standards.

Intense Competition and Counterfeit Products

Intense competition and the prevalence of counterfeit products in the automotive aftermarket are significant obstacles in the brake pads, shoes, and linings market. Low-cost counterfeit parts threaten to undermine the sales of genuine, high-quality products. These counterfeit components often compromise vehicle safety, leading to a decline in consumer trust and impacting the reputation of legitimate manufacturers. This also poses a challenge for companies attempting to differentiate themselves with superior offerings, as counterfeit products are typically marketed at a fraction of the price. The challenge of enforcing intellectual property rights and combating the spread of counterfeit goods remains a significant issue. Additionally, price wars between manufacturers make it harder to maintain profit margins, leading to market instability.

Fluctuating Raw Material Prices

Fluctuating raw material prices represent another challenge faced by the brake pads, shoes, and linings market in India. The price volatility of essential materials like metals, rubber, and friction compounds can affect production costs and impact the pricing strategy for manufacturers. As global supply chains are subject to uncertainties, manufacturers find it difficult to predict and control material costs. Price fluctuations in raw materials may force manufacturers to adjust their pricing frequently, which can lead to consumer dissatisfaction and reduced market competitiveness. Moreover, manufacturers are compelled to source high-quality materials to meet performance standards, which can further increase production costs. This volatility puts pressure on companies to adopt more efficient manufacturing processes and explore alternative materials to reduce dependence on fluctuating raw materials.

Key Market Trends

Shift Towards High-Performance Brake Components

There is a growing demand for high-performance brake pads, shoes, and linings, driven by the increasing focus on vehicle safety and advanced braking systems. Consumers are becoming more aware of the importance of reliable braking, which has led to a preference for quality components that offer superior durability and performance. The rise in the adoption of disc brakes over drum brakes in both passenger and commercial vehicles is pushing the market towards advanced materials and designs. Manufacturers are responding by developing brake components that provide better heat dissipation, longer lifespans, and reduced noise. Ceramic and carbon-based brake pads, known for their high performance, are gaining traction in the market. The trend towards high-performance components is also fueled by the growing popularity of performance vehicles, where safety and efficiency are prioritized. For example in September 2024, Hero MotoCorp has updated the Splendor+ XTEC with the addition of a front disc brake, enhancing its braking performance and safety. The new feature aligns with growing consumer demand for improved safety in entry-level motorcycles. This upgrade is expected to strengthen the Splendor+ XTEC's competitive position in the market. The move reflects Hero's commitment to incorporating advanced features in its popular models.

Growth of Electric and Hybrid Vehicle Segments

The shift towards electric and hybrid vehicles in India is a key trend influencing the brake pads, shoes, and linings market. These vehicles require specialized braking systems due to their regenerative braking technology, which demands components that offer both efficiency and long-term durability. The adoption of regenerative braking systems helps in enhancing vehicle performance and energy efficiency, which in turn drives the demand for optimized brake pads. Additionally, government initiatives promoting the use of green vehicles through subsidies and incentives are accelerating the growth of the electric and hybrid vehicle market. As the number of electric vehicles (EVs) and hybrids increases, manufacturers are focusing on developing braking solutions tailored to the specific needs of these vehicles. This trend is expected to continue as EV adoption rises in India.

Advancements in Brake Materials and Technology

The brake pads, shoes, and linings market in India is witnessing significant advancements in materials and technology. Manufacturers are increasingly adopting lightweight materials to reduce the overall weight of vehicles, thereby improving fuel efficiency and performance. The use of advanced composites and ceramic materials is on the rise due to their superior friction properties, durability, and resistance to wear and tear. Innovations like low-dust and noise-reducing brake pads are gaining popularity among consumers who prioritize comfort and safety. Furthermore, the development of integrated brake systems with enhanced sensors and electronics is creating opportunities for smarter braking solutions. These advancements are not only improving performance but also addressing environmental concerns by reducing emissions and increasing energy efficiency in

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vehicles.

Segmental Insights

Brake Type Insight

The brake pads segment dominated the India brake pads, shoes, and linings market in 2024. This segment's prominence was attributed to its widespread application in passenger and commercial vehicles, driven by increased urbanization and growing automotive sales. Brake pads served as a critical component in disc braking systems, which were increasingly preferred for their superior performance, enhanced safety, and better heat dissipation compared to traditional drum brakes.

Rising consumer awareness regarding vehicle safety standards and the demand for high-performance braking systems bolstered the adoption of brake pads across various vehicle categories. Technological advancements, such as the development of low-noise, long-lasting, and environmentally friendly materials, further strengthened the appeal of this segment. Government regulations mandating the use of advanced braking technologies in vehicles also accelerated the shift towards disc brakes, thereby increasing the demand for brake pads.

The growth of the brake pads segment was influenced by the increasing adoption of electric vehicles (EVs), which predominantly utilized disc braking systems due to their compatibility with regenerative braking technologies. The shift towards electrification in India's automotive industry, coupled with the expanding middle-class population and growing disposable incomes, further fueled the demand for brake pads during this period. The segment's dominance was supported by the extensive availability of aftermarket services, catering to the replacement and maintenance needs of vehicle owners.

Region Insights

In 2024, North India emerged as a dominant region in the Brake Pads, Shoes, and Linings market, driven by the rapid expansion of the automotive sector and the rising demand for replacement parts. The region's automotive manufacturing hubs, particularly in states like Haryana, Punjab, Uttar Pradesh, and Rajasthan, contributed significantly to the demand for brake components. With a large concentration of automotive manufacturing plants, both for domestic and international vehicle production, North India plays a pivotal role in the supply chain for brake parts. The presence of major industrial zones has fostered a strong ecosystem for the production of automotive components, including braking systems, supporting the overall market growth.

The increasing number of vehicles on the road in North India, including passenger cars, two-wheelers, and commercial vehicles, has created a sustained demand for brake pads, shoes, and linings. Rising disposable incomes and a growing middle class have driven vehicle ownership in the region, particularly in urban and semi-urban areas. The demand for both OEM (original equipment manufacturer) and aftermarket parts has surged, as vehicle owners prioritize safety and maintenance. The expanding aftermarket, especially for two-wheelers and commercial vehicles, has fueled the need for reliable brake components. This trend is reflected in the increasing focus on periodic brake maintenance and replacement, driving the market further.

Infrastructure development in North India, with significant road network expansion and improvements, has also contributed to the growth of the automotive sector, resulting in higher vehicle usage. This directly impacts the demand for quality brake components that offer superior performance and longevity. Moreover, the government's focus on enhancing transportation infrastructure, coupled with stricter vehicle safety regulations, has created an environment conducive to the growth of the braking systems market. The emphasis on vehicle safety and quality has led to a higher preference for advanced braking solutions, such as ceramic and high-performance brake pads, which are gaining traction in the region.

The rising adoption of electric and hybrid vehicles in urban areas of North India has added a new dimension to the brake pads, shoes, and linings market. As the number of electric vehicles (EVs) increases, the demand for specialized braking solutions suited for regenerative braking systems has grown. This shift is expected to continue in the coming years, further driving the market in North India. The region's strong automotive manufacturing base, coupled with growing vehicle numbers and evolving consumer preferences, positions North India as a key contributor to the brake parts market in 2024.

Key Market Players

□□ Robert Bosch GmbH

□□ Tenneco Inc.

□□ Brakes India Private Limited

□□ Sundaram Brake Linings Ltd

□□ Brake Parts Inc

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- Endurance Technologies Limited
- Amess Controls Pvt. Ltd.
- Lumax Auto Technologies Ltd.
- HL Mando Corp
- Rane Holdings Limited

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:

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

- o Two-Wheeler
- o Passenger Car
- o Commercial Vehicles

□ India Brake Pads, Shoes and Linings Market, By Sales Channel:

- o OEM
- o Aftermarket

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

- o Brake Pads
- o Brake Shoes
- o Brake Linings

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

- o North India
- o South India
- o West India
- o East India

Competitive Landscape

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

Available Customizations:

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).

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