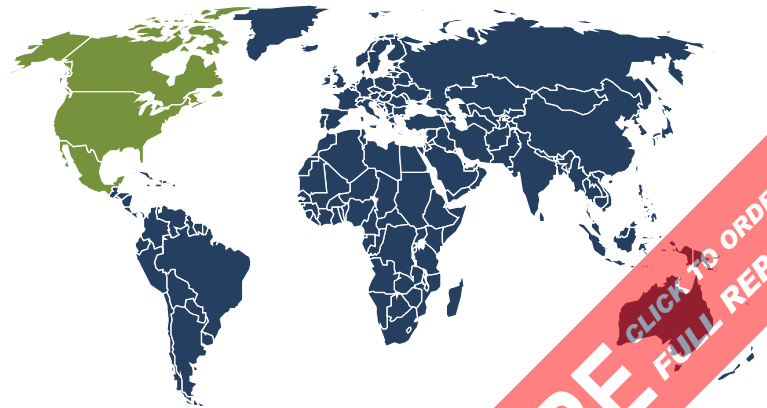




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# Automotive Brake Parts Aftermarket: North America

April 2017



## Highlights

### Market Environment

Historical Trends | Key Economic Indicators | Technology and Materials  
Vehicle Trends | Legal and Regulatory Factors

### Segmentation and Forecasts

Products | Performers

### Industry Structure

Industry Characteristics | Market Share

### Resources

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# About This Report

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## Scope & Method

This report forecasts North American demand for automotive aftermarket brake parts in US dollars at the manufacturers' level to 2021. Total demand is segmented by product in terms of:

- shoes, pads, and linings
- rotors
- cylinders and calipers
- drums
- anti-lock brake system (ABS) related parts
- other products such as brake hose and tubing assemblies, brake power actuation units, and parking brake-related parts.

In the scope of this report, "automotive" denotes light vehicles (ie, passenger cars, light trucks, and vans). The aftermarket represents parts and components installed after the vehicle has left the factory. In this report, North America comprises the US, Canada, and Mexico. This report covers parts used in friction brake systems, including those found in hybrid-electric/electric vehicles (H/EVs). Components used in H/EV regenerative braking systems (such as motor-generators and associated electronics) are excluded from consideration. Also excluded are chemical products such as brake fluid. For the purposes of this report, original equipment manufacturer (OEM) replacement parts, original equipment service (OES) parts, and aftermarket parts (as well as used parts recycled from scrapped vehicles and rebuilt or refurbished parts) are all included in the automotive aftermarket, as long as these parts are utilized to repair or upgrade light vehicles in use. Furthermore, sales are attributed to the final purchaser, rather than the installer.

Total demand is also segmented by performer as follows:

- professional
- consumer/DIY (do-it-yourself).

To illustrate historical trends, total demand is provided in an annual series from 2006 to 2016; the various segments are reported at five-year intervals for 2006, 2011, and 2016.

This report quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of

## About This Report

1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Automotive Brake Parts Aftermarket: North America* (FF85039) is based on [Automotive Aftermarket for Brake Parts in North America](#), a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group.

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

Table 5 | Industry Codes Related to Automotive Aftermarket Brake Parts

NAICS/SCIAN 2007		SIC	
North American Industry Classification System		Standard Industry Codes	
336340	Motor Vehicle Brake System Manufacturing	3292	Asbestos Products
		3714	Motor Vehicle Parts and Accessories

Source: US Census Bureau

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## Resources

### The Freedonia Group

*Automotive Aftermarket for Brake Parts in North America*, April 2017

### Freedonia Industry Studies

*Automotive Aftermarket for Powertrain Components in North America*, March 2017

*Global Internal Combustion Engine & Related Filters Market*, January 2017

*Gasket & Seal Market in the US*, December 2016

*Rechargeable (Secondary) Batteries*, September 2016

*World Bearings*, August 2016

*World Gaskets & Seals*, December 2015

*World Gears*, October 2015

*Industrial Rubber Products*, July 2015

*World Batteries*, July 2015

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*Automotive Repair & Maintenance Services: United States*

*Bearings: United States*

*Gaskets & Seals: United States*

*Hoses & Belts: United States*

*Internal Combustion Engine Filters: United States*

*Medium- & Heavy-Duty Trucks & Buses: United States*

*Metal Stampings: United States*

*Motorcycles: United States*

*Motor Vehicles: United States*

*Tires: United States*

*Transport Equipment: United States*

*World Bearings*

*World Gaskets & Seals*

*World Internal Combustion Engine Filters*

### Freedonia Custom Research

### Trade Publications

*Aftermarket Business World*

*Aftermarket News*

*AutoInc*

*Automotive Engineering International*

*Automotive News*

*Tire Business*

*WardsAuto World*

### **Agencies & Associations**

Automotive Aftermarket Industry Association  
Automotive Aftermarket Suppliers Association  
Automotive Industries Association of Canada  
Automotive Service Association  
Eurostat  
Instituto Nacional de Estadística, Geografía e Informática  
International Monetary Fund  
Motor & Equipment Manufacturers Association  
National Automobile Dealers Association  
National Highway Traffic Safety Administration  
Organisation for Economic Co-operation and Development  
Specialty Equipment Market Association  
Statistics Canada  
United States Census Bureau  
United States International Trade Commission  
World Bank