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Global Frameless Generator Market Growth 2026-2032

https://marketpublishers.com/r/G3DC179F773EEN.html
Date: October 2026
Pages: 140
Price: US$ 3,660.00 (Single User License)
ID: G3DC179F773EEN

Abstracts

The global Frameless Generator market size is predicted to grow from US$ 209 million in 2025 to US$ 346 million in 2032; it is expected to grow at a CAGR of 7.6% from 2026 to 2032.

A frameless generator is a type of electric generator designed without a traditional outer frame or housing, allowing it to be directly integrated into the mechanical structure of the driven system. Unlike conventional generators that come as standalone units, frameless designs consist primarily of a stator and rotor assembly, which can be embedded into a machine's existing housing—such as in electric vehicles, wind turbines, industrial robots, aerospace systems, or compact energy modules. This integration results in a lighter, smaller, and more efficient power generation system, as it eliminates redundant mechanical components and improves thermal management and torque density.

In 2024, global frameless generator production reached approximately 344.95 k units, with an average global market price of around US$ 574 per unit. And global frameless generator production capacity reached approximately 390 k units. The average gross margin in this industry reached 31.58%.

Upstream: The upstream of the Frameless Generator industry mainly includes suppliers of high-performance magnetic materials, copper windings, laminated cores, and power electronics. Core materials such as neodymium-iron-boron (NdFeB) permanent magnets, enamelled copper wire, and electrical steel determine efficiency and power density. Manufacturing integrates precision coil winding, magnetic circuit design, and stator-rotor assembly to achieve compact, lightweight structures suited for direct-drive systems. Representative upstream suppliers include VACUUMSCHMELZE (magnetic materials), Nippon Steel (electrical steel), and LS Cable & System (copper conductors). Upstream innovation focuses on improving magnetic flux density, thermal management, and modular integration with advanced drive electronics for higher efficiency and

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reliability.

Downstream: Frameless generators are widely used in aerospace, robotics, wind turbines, electric vehicles, and industrial automation where direct integration with mechanical systems is required. They provide torque-dense, high-efficiency power generation without a traditional housing, enabling flexible design for compact applications. Representative downstream companies include Siemens Gamesa (wind energy systems), Kollmorgen (robotic drive solutions), and Airbus (aerospace power units). With the increasing adoption of electrified and lightweight systems, downstream demand is shifting toward frameless generators featuring high torque-to-weight ratios, digital control compatibility, and integrated cooling systems for optimized performance in space-constrained, high-efficiency energy conversion environments.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Frameless Generator Industry Forecast” looks at past sales and reviews total world Frameless Generator sales in 2025, providing a comprehensive analysis by region and market sector of projected Frameless Generator sales for 2026 through 2032. With Frameless Generator sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Frameless Generator industry.

This Insight Report provides a comprehensive analysis of the global Frameless Generator landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Frameless Generator portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Frameless Generator market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Frameless Generator and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Frameless Generator.

This report presents a comprehensive overview, market shares, and growth opportunities of Frameless Generator market by product type, application, key

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manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

High Speed

Low Speed

Segmentation by Rated Power:

Rated Power below 2 kW

Rated Power 2-5 kW

Rated Power 5-10 kW

Rated Power above 10 kW

Segmentation by Inner Diameter:

Inner Diameter below 300 mm

Inner Diameter 301-600 mm

Inner Diameter above 600 mm

Segmentation by Application:

Power Generation

Industrial

Transportation

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Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

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Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

WITTENSTEIN

Kollmorgen

Motion Control Products

Nidec Motor Corporation

Designatronics

Allied Motion

PARKER HANNIFIN

Sensata Technologies

Moog

NMB Technologies

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Delta Line

Maxon Group

Celera Motion

Mclennan

Pranshu Electricals

AEROTECH

Key Questions Addressed in this Report

What is the 10-year outlook for the global Frameless Generator market?

What factors are driving Frameless Generator market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Frameless Generator market opportunities vary by end market size?

How does Frameless Generator break out by Type, by Application?

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