

# Global Artificial Ground Freezing(AGF) Market Research Report 2026(Status and Outlook)

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## Abstracts

Artificial Ground Freezing (AGF) is a geotechnical engineering service that actively lowers the ground temperature to below freezing using a refrigeration system, causing groundwater to solidify and form a high-strength frozen soil barrier. Its core functions include ground reinforcement, groundwater isolation, and deformation control, and it is suitable for soft, high-water-content formations (such as saturated sand and silt).

### Market Structure and Regional Characteristics

The global artificial ground freezing (AGF) market exhibits significant technology-driven differentiation and regional division of labor. In the Asia-Pacific region, centered around China, local companies dominate the mid-range market with both cost and technological advantages. Brine freezing technology accounts for over 60% of the market, with equipment costs 40% lower than in Europe and the United States. These companies primarily serve scenarios such as subway construction and contaminated site remediation. Driven by strict green construction regulations, Europe has a 75% penetration rate for liquid nitrogen quick freezing technology. This high-end solution, combined with patented AI temperature control technology, commands a premium of over 30% compared to Asia-Pacific, focusing on historical building preservation and sustainable engineering. North America, with mining applications as its core (accounting for 70% of regional demand), combines high-end monitoring systems with liquid nitrogen deep freezing technology to meet the needs of rapid shaft support and high groundwater pressure environments, resulting in world-leading technical complexity.

### Major Global Manufacturers

The global artificial ground freezing (AGF) industry exhibits a technology-driven competitive landscape. The top five companies hold a combined 52% market share, with technological barriers and project experience forming their core competitive advantage. Specifically, Italy's Trevi Group leads the market with an 18% share. Its independently developed 3D printing technology for freezing pipes achieves an accuracy of less than 0.1mm and holds the world record for the deepest freeze at 280 meters. The UK's Keller Group holds a 15%

share. Its core product, the intelligent freezing control system, successfully supports landmark projects such as the London Crossrail Tunnel by adjusting refrigerant flow in real time. China Coal Technology and Engineering Group holds a 12% share. Its innovative liquid nitrogen-brine composite freezing technology effectively solves the problem of rapid water-stopping in water-rich sand layers. Germany's Linde dominates the high-end emergency market with its liquid nitrogen ultra-low temperature systems, widely used in scenarios such as tunnel repair. These companies, through differentiated technological approaches, are jointly driving the evolution of AGF towards deeper, smarter, and greener development.

**Industry Chain Division of Labor**

The global artificial ground freezing (AGF) industry chain exhibits a clear vertical division of labor: the upstream sector primarily comprises refrigeration equipment manufacturers and environmentally friendly refrigerant suppliers. The former provides core hardware such as compressor units and heat exchangers, while the latter replaces traditional CFCs with green refrigerants such as CO<sub>2</sub> and NH<sub>3</sub> to meet environmental regulations. The midstream sector is divided into two main categories: technology solution providers and engineering contractors. Technology solution providers specialize in customized freezing design (such as freezing pipe layout and refrigerant circulation optimization), while engineering contractors are divided into large infrastructure groups (providing full-process freezing, support, and monitoring services) and specialized refrigeration companies (focusing on niche areas such as liquid nitrogen rapid freezing and deep ground freezing). Downstream application areas include public infrastructure (subway tunnels, bridge foundations), mining groups (shaft support, goaf remediation), and energy companies (oil and gas pipeline/drilling platform foundation reinforcement), forming a complete industry closed loop from equipment supply, solution design, to project implementation.

**Policies and Industry Challenges**

In geotechnical engineering, China and the EU are promoting technological innovation through policy guidance, but the industry still faces multiple challenges. China has included brine freezing technology in the "14th Five-Year Plan" key technology catalog and is promoting standardization. The European Union has mandated the use of low-carbon refrigerants and subsidized the development of liquid nitrogen AI systems. Both sides are attempting to overcome the limitations of traditional processes. However, technological monopoly issues have become prominent: European and American companies hold core patents for liquid nitrogen rapid freezing and AI control, making it difficult for small and medium-sized enterprises to participate in technological iterations. In terms of engineering applications, ground surface uplift exceeding 5mm caused by frost heave can damage surrounding buildings and increase ground pretreatment costs by 30%. In terms of economic efficiency, energy consumption accounts for over 50% of total project costs (200-800kW·h/m<sup>3</sup>), and electricity price fluctuations directly impact profit margins, forming a chain reaction of "policy promotion, technical bottlenecks, and cost

pressures."

The global Artificial Ground Freezing (AGF) market size was estimated at USD 1915.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Artificial Ground Freezing (AGF) market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global Artificial Ground Freezing (AGF) market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the Artificial Ground Freezing (AGF) market.

### **Global Artificial Ground Freezing (AGF) Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate

product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Trevi Group  
Keller Group  
China Coal Technology & Engineering Group  
Linde  
SoilFreeze  
SYSTRA  
Stuart Wells  
DMT GROUP  
Geofrost  
Max B?gl  
SoilFreeze  
CDM Smith

### **Market Segmentation (by Type)**

Brine Freezing  
Liquid Nitrogen Freezing  
Glycol Solution Freezing  
Heat Exchanger Freezing

### **Market Segmentation (by Application)**

Tunneling and Underground Construction  
Mining  
Drilling Operations  
Pipeline Construction  
Other

### **Geographic Segmentation**

North America (USA, Canada, Mexico)  
Europe (Germany, UK, France, Russia, Italy, Rest of Europe)  
Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)  
South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study  
Neutral perspective on the market performance  
Recent industry trends and developments  
Competitive landscape & strategies of key players  
Potential & niche segments and regions exhibiting promising growth covered  
Historical, current, and projected market size, in terms of value  
In-depth analysis of the ??Artificial Ground Freezing(AGF) Market  
Overview of the regional outlook of the ??Artificial Ground Freezing(AGF) Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the ??Artificial Ground Freezing(AGF) Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the

industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of ??Artificial Ground Freezing(AGF), their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

### **Key Reasons to Buy this Report:**

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change  
This enables you to anticipate market changes to remain ahead of your competitors  
You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents  
The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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