

Nursing Care Robot Market in Japan: Key Research Findings 2013

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic nursing care robot market with the following conditions:

1. Research period: October to December, 2013
2. Research target: Manufacturers and suppliers of robots and robotic devices for nursing care , and related R&D institutes
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone/email, and literature research

<What are Nursing Care Robots?>

The nursing care robots in this research indicate those non-industrial (or service) robots and robotic devices that mainly engage in nursing and welfare services for the elderly. The tasks designated for these robots include helping the elderly move between rooms in care centers, assisting with their eating, walking and toilet needs, and tracking those prone to wandering off. If these robots and robotic devices are able to do the above-mentioned tasks, they do not need to be equipped with the three conditions of robots that originally required by MITI: sensing, self-control, and drive.

This research does not intend to include medical robots and robotic devices used for rehabilitation, communication and therapy; however, it is sometimes difficult to distinguish between the two due to some overlapping functions and abilities.

◆ **Key Findings**

■ **Nursing Care Robot Market in FY2012 Attained 170 Million Yen, 137.1 % of Previous Year**

Size of the nursing care robot market in FY2011 rose to 124.0 million yen and it further expanded to 170.0 million yen in FY2012, 137.1% of the size of the previous year, based on the shipment value of manufacturers. Although the nursing care robots and robotic devices saw growth in FY2012 not only in volume but also in value, the absolute cost is not so high yet. Currently, those robots and robotic devices are used mainly for support of toilet and walking needs of the elderly, but, they are far from popular yet, so that only limited number is actually used at medical or home nursing place.

■ **Development of Robots (Robotic Devices or suits) Underway, Aiming for Empowering Care Givers to Move and Lift Elderly, Assisting with Elderly for Needs of Walking and Toilet, and Watching Them**

In FY2013, the development and promotion of nursing care robots and robotic devices has started, as MITI selected some successful applicants for “the Project to Promote the

Development and Introduction of Robotic Devices for Nursing Care.” Since the project places importance not only on development but also on diffusion of such robots and devices at care-giving sites, the applicants are required to have clear visions in effectiveness, inexpensiveness, and user-friendliness in their plans. The successfully selected developers are expected to provide final products by 2015. The progress of development and structure of robots differ by manufacturer. Though the contents and assumed prices of such development are not fully unveiled yet, the performance and effects of such robots are considered to be clarified after a series of tests and demonstrations, which determine specification and prices as they come to be products.

■ **Market Prospects: After Fully Established in FY2015, Nursing Care Robot Market Expected to Expand to 34.980 Billion Yen by FY2020**

Reviewing of the nursing-care insurance system scheduled in FY2015 and expected increase of nursing care robots and devices are likely to be the tailwind for the market to bloom. In addition, the government is expected to work on a plan for diffusion of the robots and devices. The market size is anticipated to rise to 2.3 billion yen in FY2015, and expand further to 34.980 billion yen in FY2020.

◆ **Report format:**

Published report: “Nursing-Care Robot Market 2013”

Issued on: December 24, 2013

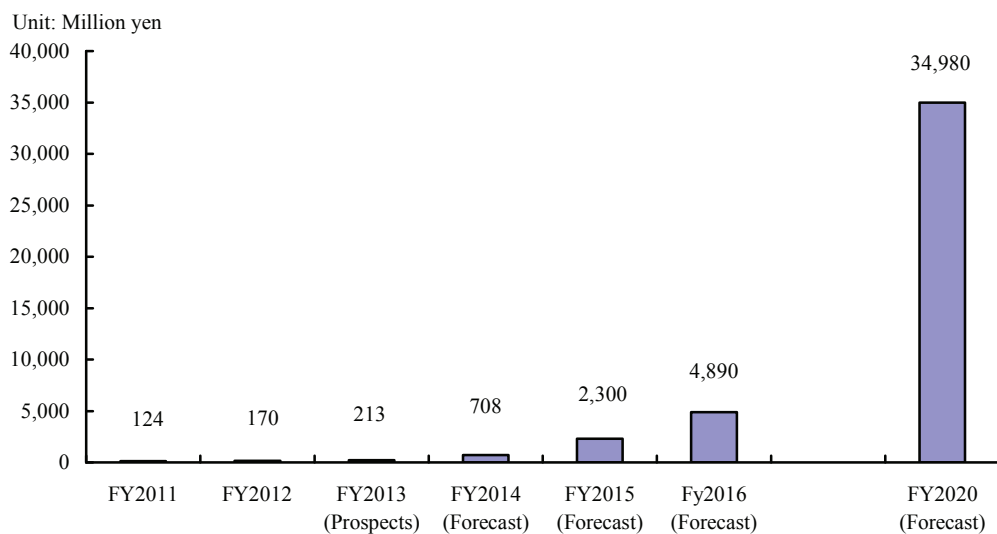
Language: Japanese

Format: 171 pages in A4 format

Price: 150,000 yen (consumption tax charged for the sales in Japan will be added separately.)

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■ **Figure 1: Forecast and Transition of Size of Nursing Care Robot Market**



Notes:

1. The figures are based on the shipment value of manufacturers.