

# **Ministry of Economy, Trade and Industry's long-term care technology policy trends**

**March 2026**

**Medical and Assistive Device Industries Office**

**Healthcare Industries Division**

**Commerce and Service Industry Policy Group**



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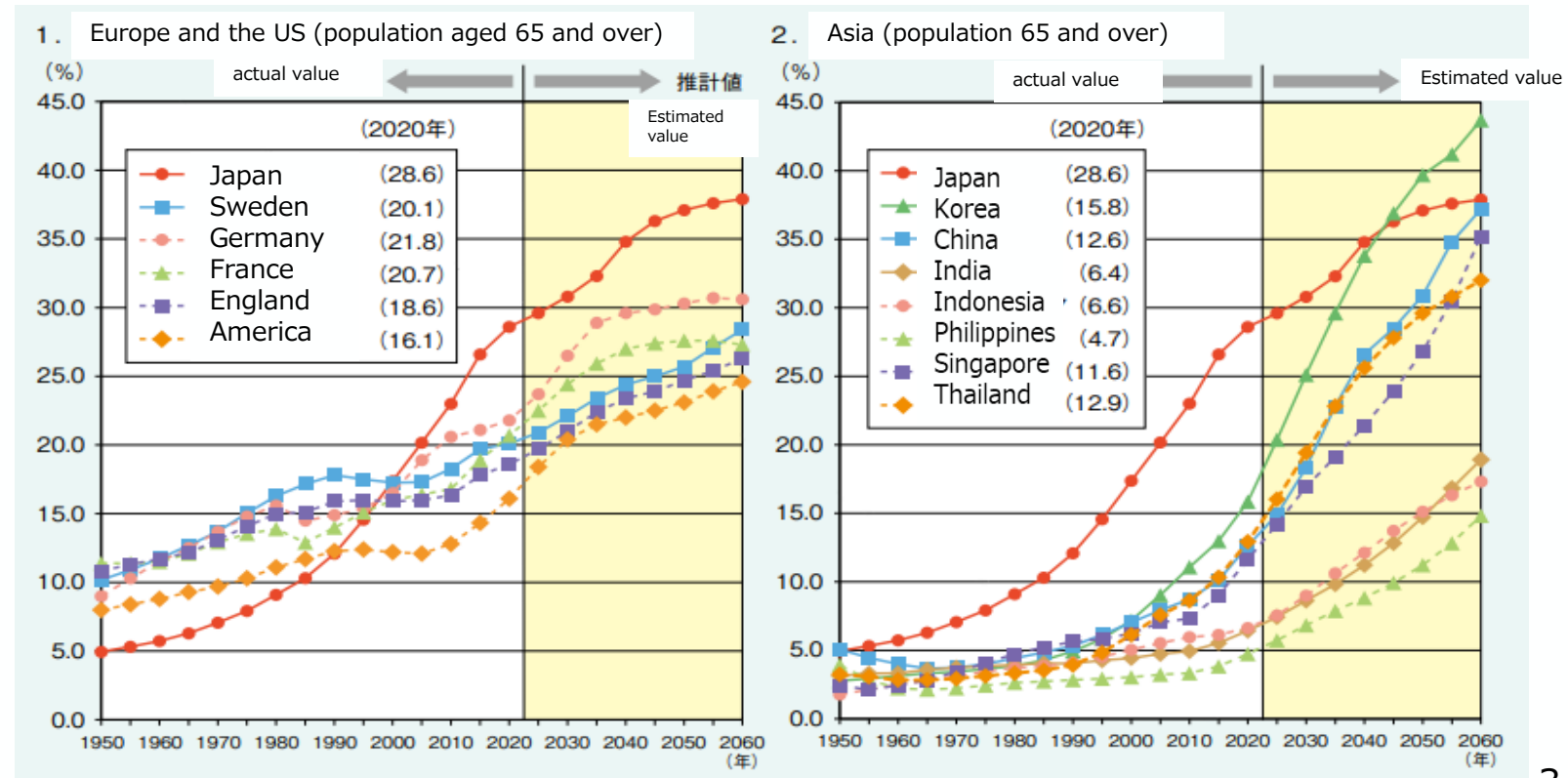
# The aging population

- Japan is the world's longest-living country.
- The aging rate is also the highest in the world, with the proportion of the population aged 65 or over expected to reach nearly 35 % by 2040.

## Global life expectancy

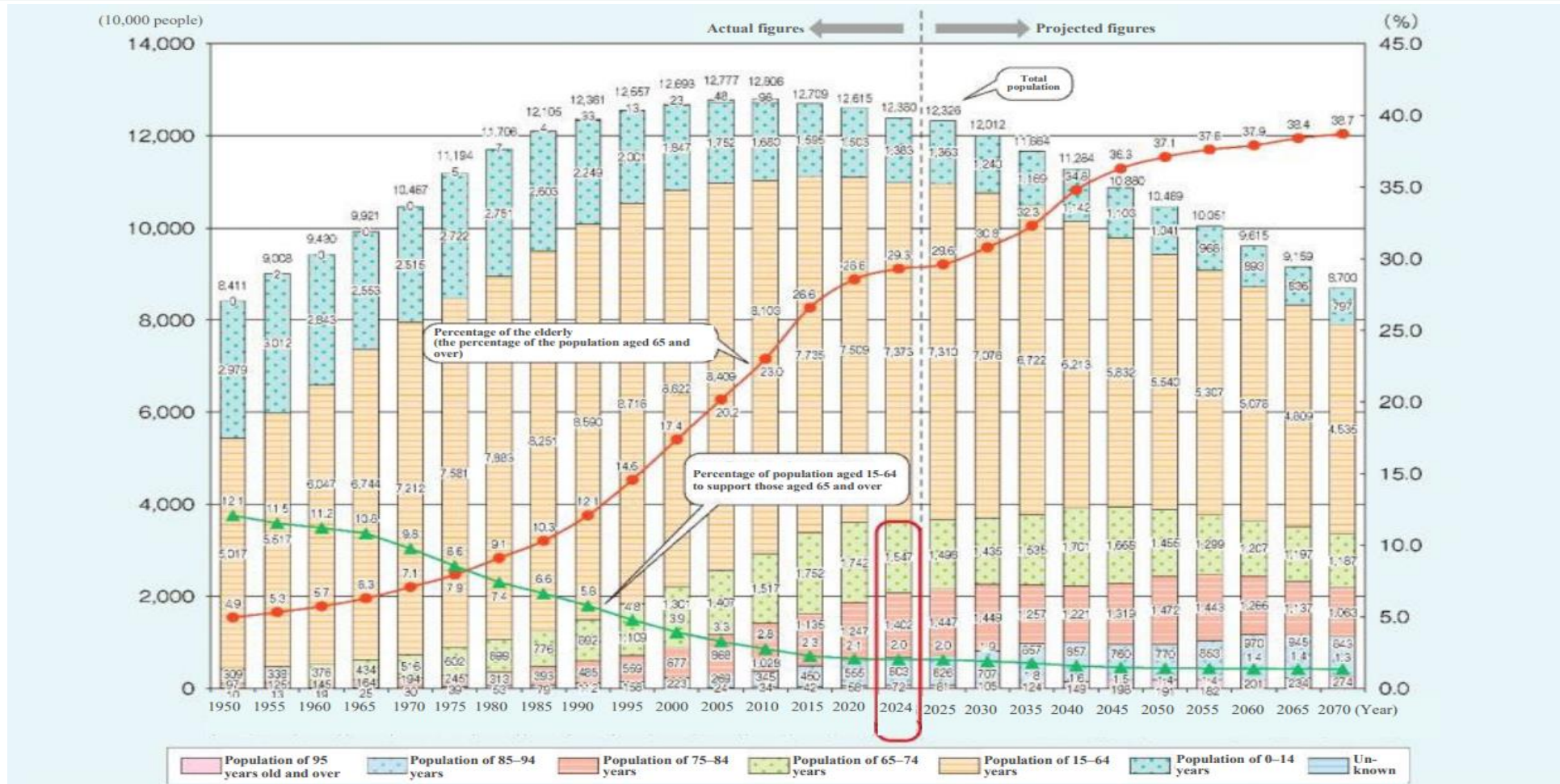
Ranking	Country name	average lifespan (Average for men and women)
1	Japan	84.5
2	Singapore	83.9
3	South Korea	83.8
4	Switzerland	83.3
5	Australia	83.1
6	Norway	82.9
7	Luxembourg	82.8
8	Spain	82.7
8	Sweden	82.7
10	Iceland	82.6

## Trends in the world 's aging rate ( trends in the proportion of people aged 65 and over to the total population )



# Declining working-age population

- Due to the declining birthrate and aging population, Japan's working-age population ( 15 to 64 years old) has been declining since peaking in 1995.
- There are concerns that the decline in the working-age population.

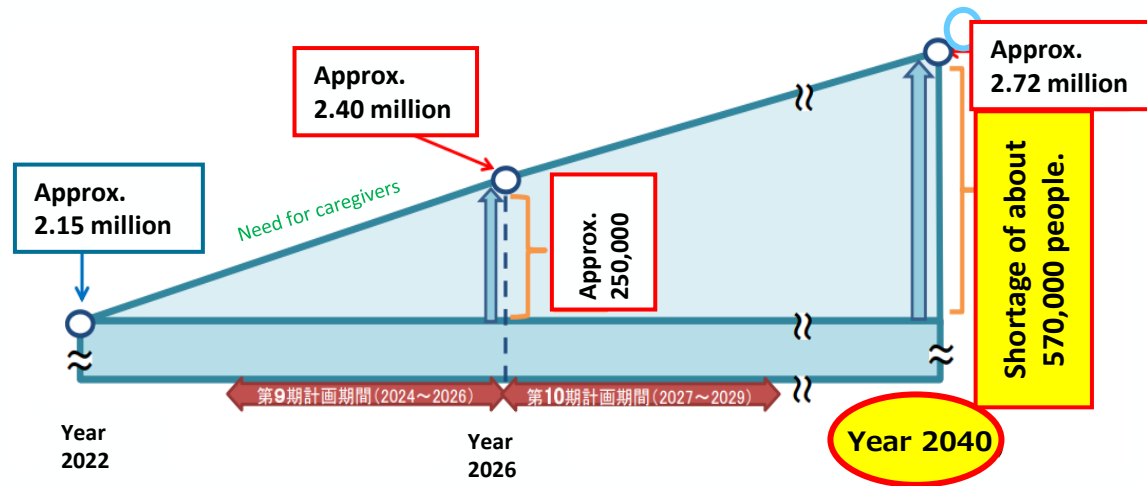


(Source) 2025 Annual Report on the Ageing Society

# Shortage of Caregivers

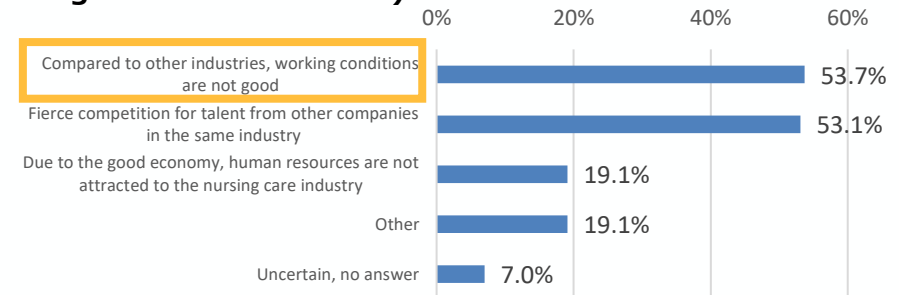
- By 2040, there will be a caregiver shortage of approximately 570,000.
- In order to solve the shortage of caregivers, we must develop equipment that contributes to improving productivity and reducing the burden on those who provide care, and to promoting self-reliance and social participation of those receiving care (reducing the demand for long-term care).

Estimation of Supply and Demand for Caregivers

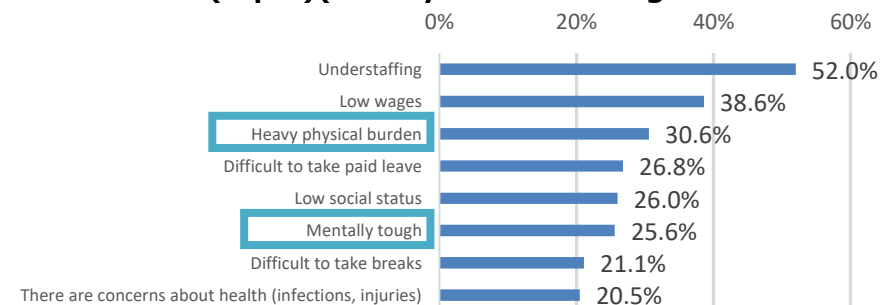


出所：「第9期介護保険事業計画に基づく介護人材の必要数について（令和6年7月12日）」別紙1より

Reasons for the difficulty of hiring (survey items for long-term care facilities)



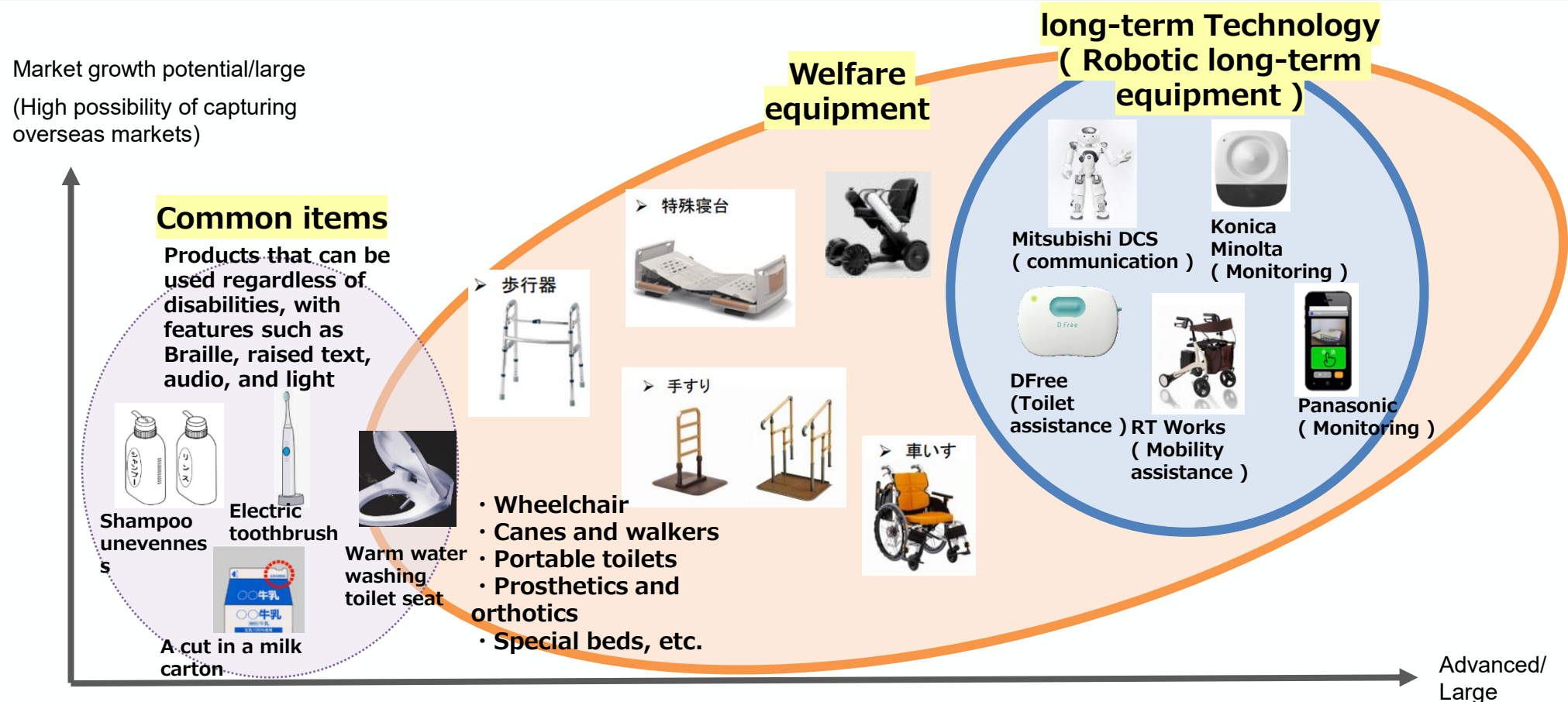
Worries, anxieties, dissatisfactions, etc. of working conditions (top 8)(Survey items for long-term care staff)



出所：公益財団法人 介護労働安定センター 「令和2年度介護労働実態調査」より経済産業省が作成

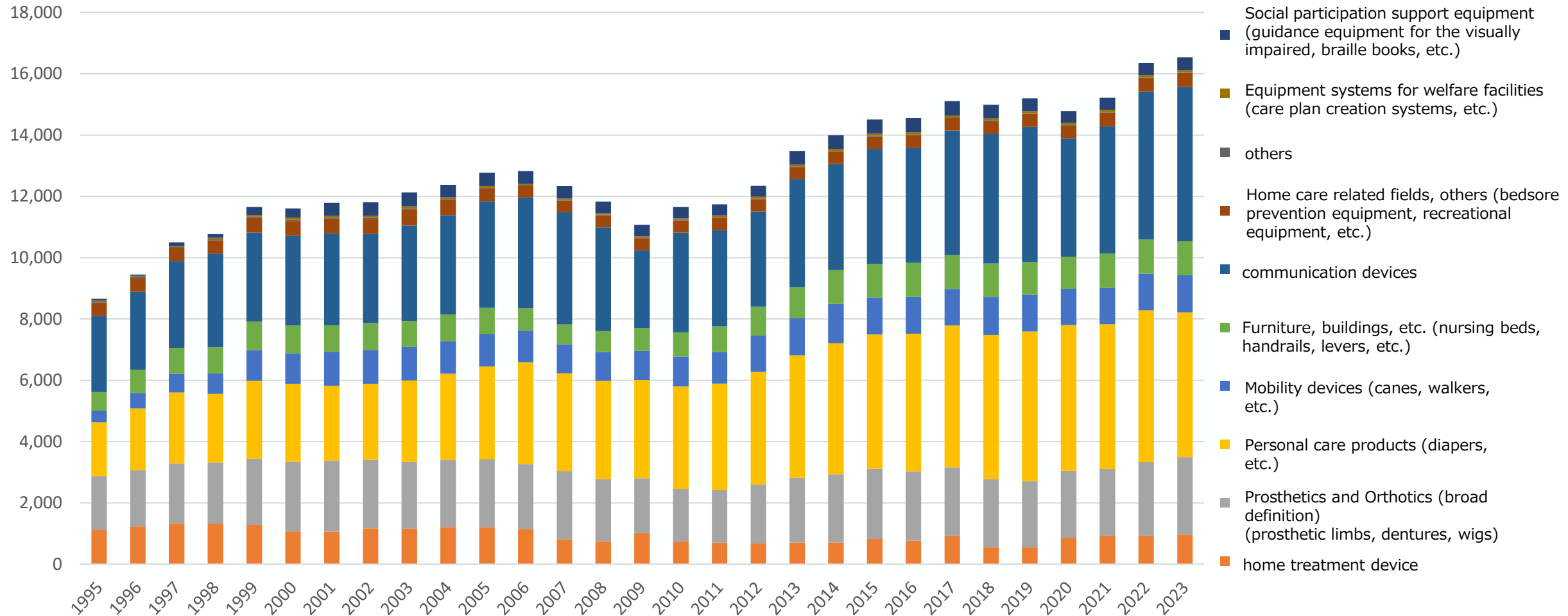
# Welfare equipment supported by the Ministry of Economy, Trade and Industry

- In addition to conventional devices such as wheelchairs, canes, prosthetic limbs and braces, welfare equipment also includes devices that utilize cutting-edge technology (long-term care technology).



# Market size of the welfare equipment industry

- The market size of the welfare equipment-related industry in fiscal year 2023 is estimated to be approximately 1.6 trillion yen.



\* Welfare equipment in the narrow sense does not include "shared items" such as universal design or accessible design.



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# Policy direction for the long-term care technology industry

- In order to solve social issues such as the aging population, rising social security costs, and a shortage of caregivers, there is a need to develop **long-term care technologies that will help improve productivity and reduce the burden on caregivers, and promote independence and social participation among those receiving care (reducing the demand for long-term care)**.
- Taking into account the development trends of digital technology and the needs of the long-term care scenes, we aim to solve social issues by **promoting the development and dissemination of long-term care technology as a priority area**, while also strengthening industrial competitiveness and creating a successful model in Japan, where the aging population is progressing faster than anywhere else in the world, and **aiming to capture the global market**.

## Direction of support measures

### ① Development assistance

[ Purpose ] Strengthening development that contributes to supporting the independence of the elderly and reducing the burden on caregivers

- Promoting the development of evidence-based, highly competitive long-term care technology

### ② Overseas expansion support

[ Purpose ] Collecting issues and know-how for expanding long-term care technology overseas and acquiring overseas markets

- Development of clinical evaluation guidelines
- Support based on feasibility study results for overseas expansion

**Creating long-term care technology that contributes to long-term care needs both domestically and internationally**

**Industrial growth and resolving social issues globally**

# System for Accelerating the Development and Introduction of Technology for Long-term Care

(Operation based on the revised priorities will commence in April 2025.)

**Private sector companies, research institutes, etc.**

Development of equipment

Taking advantage of the high-level engineering capabilities in Japan to support development of equipment based on specific needs of the elderly and long-term care scenes

**Led by METI**

Request for monitor studies, etc.



Evaluation of prototypes, etc.

Provide opportunities for exchanging opinions between development scenes and long-term care scenes

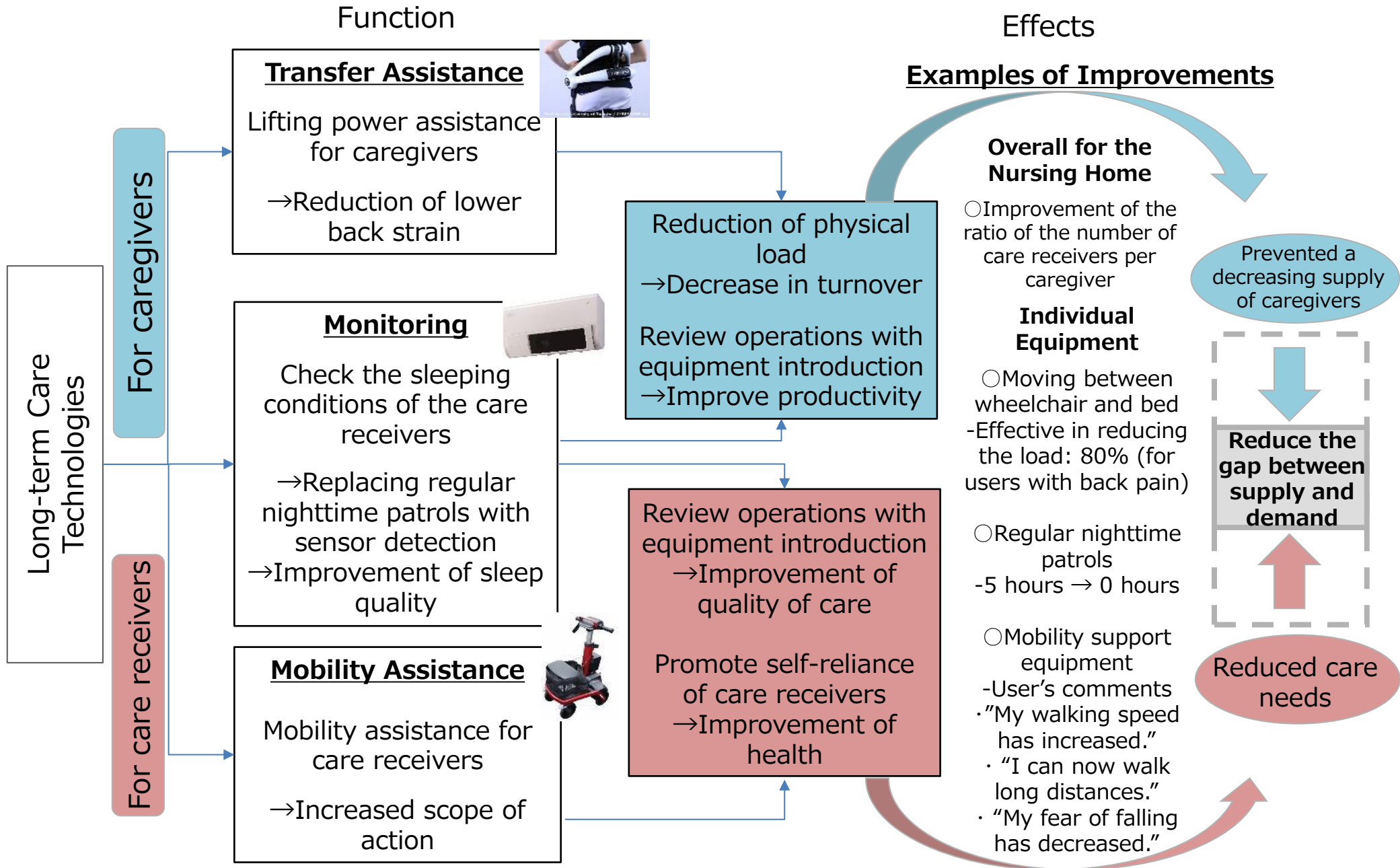
**Long-term care scenes**

Verification at long-term care scenes, etc.

From the early stages of development, carrying out verification (monitor studies, evaluation) regarding prototype equipment and conveying long-term care scenes' needs **Led by MHLW**

<p><b>Transfer assistance</b></p> <p><b>Wearable</b> Wearable devices providing power assistance for caregivers</p>	<p><b>Mobility assistance</b></p> <p><b>Outside</b> Walking assist devices using robot technology to assist the elderly and others in walking outdoors and to safely carry loads</p>	<p><b>Toilet assistance</b></p> <p><b>Estimation and detection</b> Devices that predict or detect excretion, determine the timing of excretion, and assist in guiding people to a toilet</p>	<p><b>Monitoring and communication</b></p> <p><b>In facilities</b> Monitoring system platforms with sensors and external communication functions for long-term care facilities</p>	<p><b>Care work support</b></p> <p>Devices and systems that enable the collection and accumulation of information associated with long-term care work, and that can then use this information for operations related to the provision of long-term care services to the elderly and others</p>
<p><b>Non-wearable</b> Non-wearable devices that assist caregivers when lifting the elderly and others</p>	<p><b>Indoor</b> Walking assist devices using robot technology to assist the elderly and others in moving indoors, standing up and sitting down, and particularly assisting them in getting to and from a toilet and supporting their posture in a toilet</p>	<p><b>Excrement disposal</b> Adjustable positioning toilets using robot technology for feces disposal</p>	<p><b>At home</b> Monitoring system platforms with sensors and external communication functions for home long-term care</p>	<p><b>Functional exercise support</b></p> <p>Devices and systems that support each task (assessment, planning and implementation of training) in the training of physical and daily functions performed by long-term care workers and others</p>
<p><b>Bathing assistance</b></p> <p>Devices to support care and motion in bathing</p>	<p><b>Wearable</b> Wearable mobility assistance devices using robot technology to assist the elderly and others in walking outdoors, preventing falls and assisting motion</p>	<p><b>Motion assistance</b> Devices using robot technology to assist the elderly and others in the series of motions for removing and putting on clothes below the waist in a toilet</p>	<p><b>Communication</b> Devices that support communication among the elderly and others</p>	<p><b>Daily support and long-term care support for people with dementia</b></p> <p>Devices and systems that support independent daily living or individual care for elderly people with cognitive decline</p>
				<p><b>Assistance for eating and nutrition management</b></p> <p>Devices and systems that support peripheral operations related to diet and nutrition management for the elderly and others</p>

# Improvement after Introduction of Long-term Care Technologies (Image)



# Development Support

- Based on the priority areas set by the Ministry of Economy, Trade and Industry and Ministry of Health, Labor and Welfare, we support the improvement and development of long-term care technology that will help improve productivity and quality of care at long-term care facilities and at home, as well as contribute to the independence of the elderly.

## Development Subsidy ( FY2025 )

Subsidy amount: Up to 20 million yen per year per project

Research and development period: July 2025 to the end of fiscal year

Subsidy rate: 1/3 for large companies , 2/3 for small and medium-sized enterprises

## FY2025 Selected Projects

Research and Development Project Name	Representative organization	Priority Areas
Empirical research into AI/ICT for swallowing to support aspiration prevention and dietary and nutritional management for the elderly	PLIMES Co., Ltd.	Assistance for eating and nutrition management
Development of training support equipment that visualizes progress of cognitive and physical functions using mixed reality technology	Techlico Inc.	Functional exercise support
Development of a multi-functional nursing bed with transfer support function, the "Multi Support Bed"	France Bed Co., Ltd.	Transfer assistance

# Development Support

- To date, we have provided support for the development of long-term care technology in 128 cases, of which 35 have been put into practical use .
- Advances in digital technology are driving the development of ICT equipment that can be linked to devices such as smartphones.

## Mechanical

### Transfer assistance (wearable)

**Company** : CYBERDYNE Inc. HAL



- By using weak bioelectric potential signals from the skin surface, it is possible to assist movements that reflect the human's intentions, reducing the load on the lower back.

### Mobility assistance

**Company** : RT.Works Co., Ltd. RT.1



- A cart with walking assist functions such as assist and brake control that takes into account the user's operating strength and road conditions.

## ICT system

### Toilet assistance (Estimation and detection)

**Company** : DFree Co., Ltd. DFree



- Using ultrasound, changes in the bladder can be detected and urination timing can be notified to each device before and after the event, allowing for management.

### Monitoring

**Company** : Konica Minolta, Inc. HitomeQ



- Utilizing image sensing technology to realize new data-based long-term care operations

# Overseas expansion support

- Hurdles include accurately understanding each country's long-term care needs, systems, and culture, and a lack of know-how regarding medical device certification.

## Support for overseas needs / competitive analysis

- Selection of target countries and regions
- Analyze current issues in long-term care facilities and at-home care in selected countries and regions, and understand market development potential

- Analyze the possibility of entering the market based on the current competitive situation, substitute products, and new entrants.

## marketing

- Organize what kind of target audience and what points the product will appeal to
- Then, consider an effective business model

## Certification support

- Transfer assistance, toilet assistance, etc. are treated as medical devices in other countries and therefore require approval. Therefore, guidance has been developed to guide the implementation of regulatory-compliant clinical evaluations in Japan.

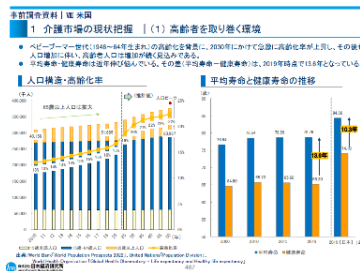
## Developing sales channels

- Connect with local agents and customers

### Support measures

i ) Feasibility study and improvement development to meet local needs

Overseas expansion of home robotic long-term care care equipment Preliminary Survey Report ( March 20 , 2023 edition)



Supporting the overseas expansion of home-use robotic long-term care equipment Developer Know-How Collection ( March 2023 )



ii ) Accreditation evaluation guidelines

Explains the clinical evaluation procedure with examples for each process



iii ) Matching support

Hosting a symposium inviting embassy staff



### Support results

# Overseas expansion support

- In fiscal 2025, we will support feasibility studies in various countries by companies aiming to expand overseas, and gather knowledge about local long-term care systems, cultural backgrounds, needs, marketing, etc.
- The results of the surveys of the overviews of various countries and the companies that supported the feasibility studies will be published on the AMED website.

## FY2025 Selected Projects

Research and development into the deployment of a smartwatch-linked app for long-term care and dementia prevention in the Greater Bay Area of China

**Company** : CogSmart Inc.

In China and Hong Kong, we will localize a smartwatch-linked app for long-term care and dementia prevention, implement it as a model for long-term care prevention measures, and verify its reproducibility and feasibility of implementation locally.

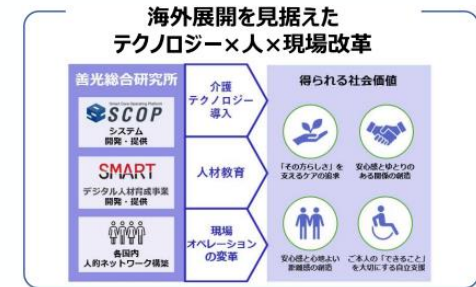


<https://www.amed.go.jp/content/000151780.pdf>

Research and development into the implementation effects and local adaptation of long-term care technology with an eye toward overseas expansion

**Company** : Zenkou Research Institute Co., Ltd.

When deploying long-term care technologies such as SCOP in long-term care settings in China, Taiwan, Singapore, and Malaysia, we will clarify the compatibility and adaptation issues with local systems, culture, and operational realities, and verify the gradual implementation process and its effects.

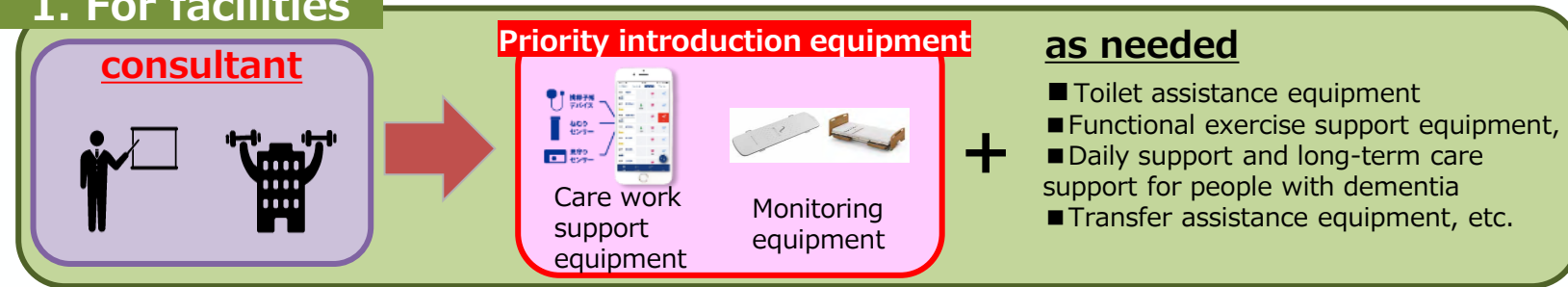


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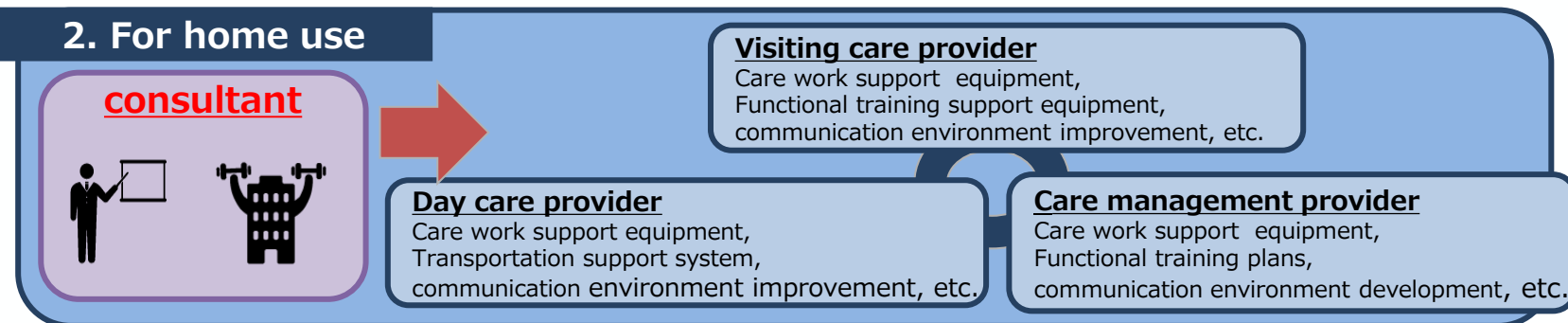
# The Project for comprehensive improvement of long-term care settings through DX

- Of this project is to clarify the investment benefits by focusing on the combined use of multiple long-term care technologies and supporting package models that utilize long-term care digital transformation.
- **We provide a long-term care DX package model that will enable fundamental efficiency gains by (1) selecting long-term care technology based on the challenges faced by the facility, (2) providing support to help care staff become familiar with how to use the equipment , and (3) evaluating the effectiveness of the equipment and providing support for improvements.**
- **In-home long-term care services are carried out through collaboration between multiple offices. It is expected that supporting multiple offices on an area-by-area basis will produce greater results** than supporting individual offices with long-term care DX package models.

## 1. For facilities



## 2. For home use



● By using it in actual long-term care sites, the return on investment of the package becomes clear.

● An implementation model will be established that is tailored to the actual circumstances of each region.

● Expand successful cases to other areas.

**Thank you for listening**

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