

Executive summary

Finland, Sweden and Norway together could absorb around 143,000 care robots by 2035 if robots took over half of the care tasks a robot can in principle do. That is an €11.4 billion fleet investment and €3.8 billion a year in spending. Whether this market opens depends on price. Buyers will pay for capacity, not for staff cuts, and Norway is the only country where a low-cost robot can also pay back through staff savings.

This briefing combines three country analyses of humanoid robots in home care and residential care for older people [1–3]. All figures are scenarios, not sales forecasts: they show what fleet the task volume would require and what buyers could afford, using each country's official staffing, wage and service data.

Scenario for 2035: what the three countries would need if robots performed half of the robot-suitable care tasks, in shared fleets, at base-case costs

143,000	€11.4 bn	€3.8 bn	9,300
robots needed in shared fleets in 2035	fleet investment the scenario requires	annual spending on fleets in 2035, investment included	care homes and home-care units that exist today

Five findings for manufacturers

1 The market is large but conditional.

At 20% of the task basket the three countries need 60,000 robots; at 80%, 226,000. Sweden is the largest market (81,000 robots at 50%), followed by Norway (39,000) and Finland (23,000).

2 Buyers pay for capacity, not headcount cuts.

Freed minutes rarely add up to whole shifts, so only 3–12% of robot task time comes out of staff schedules. Every country analysis advises buyers not to budget staff reductions. Valued as care capacity, freed time exceeds fleet cost by about NOK 7.0 billion (≈ €0.66 billion) a year in Norway, roughly breaks even in Finland (+€0.06 billion) and falls short by about SEK 1.3 billion (≈ €0.12 billion) in Sweden.

3 Norway is the beachhead.

Norwegian care staff cost about €55 an hour, the highest in the region. A robot costing under about €6,900 a year all-in pays back on staff savings alone, and up to about €43,800 a year pays back as extra capacity.

4 Shared fleets win; one robot per home loses.

A robot in each client's home turns every country's result €1.3–4.2 billion a year negative. Products must be built for fleets shared across a care home or home-care team.

5 The competitor is the specialised device already installed.

Most Nordic municipalities already run medication dispensers and digital night supervision. A humanoid has to beat these on tasks that need mobility, two hands or several jobs on one machine.

Three moves for the next 12 months

1 Enter through Norwegian care homes on a service contract.

Price a shared-fleet robot as a service at or below about €575 a month all-in for the savings case, and up to about €3,650 a month for the capacity case. Care homes, not home care, convert freed time into removable shifts.

2 Make data residency and security product features.

Published security research on a widely sold humanoid has made Nordic buyers alert to telemetry and remote access. EU-hosted data, offline operation and default-off telemetry should be in the tender response, not added later.

3 Co-fund measured pilots and publish the results.

Nordic buyers decide on measured staff time, not demos. A pilot that logs robot activity, staff work and shifts with one event ID gives the evidence the country reports ask buyers to demand.

Full report. The 30-page report adds market sizing by country with the care-home and home-care split, price-to-win analysis, buyer requirements, procurement routes and timelines, an adoption path to 2035, country entry sheets and 68 sources: nordicsignalresearch.fi/en/eldercare-robotics-market. Figures are scenarios from the NSR-R01–R03 edition 1.1 country models.

[1] NSR-R01, painos 1.1 (Finland). [2] NSR-R02, utgåva 1.1 (Sweden). [3] NSR-R03, utgave 1.1 (Norway). Nordic Signal Research, 2026.