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Private and Voluntary Nursing Home Fair Deal Rate

Analysis of The National Treatment Purchase Fund
(NTPF) Agreed Private & Voluntary Nursing Home
Fair Deal Rate (FDR) Changes in September 2025



Fair Deal Rate (FDR) Changes

September 2025

Introduction

Every month the HSE releases an update on the prevailing FDR for private & voluntary nursing homes operating under the Fair Deal Scheme across the country. This FDR represents the maximum price per week agreed between the nursing home and the HSE under the Nursing Home Support Scheme, providing an insight into not only the highest and lowest rates being achieved but also into the changes occurring on a monthly basis for each individual private and voluntary nursing home.

Nursing homes under the Fair Deal Scheme allow for residents to pay only a portion of their cost of care and the remaining is paid by the HSE to the nursing home.

For the past number of years, our Healthcare Team in Corporate Finance has analysed these changes, noting trends and patterns on a county-by-county basis and an all-country basis. We have now prepared this report to highlight the change in the rates between June 2025 and September 2025.

BDO's Healthcare Team provides the following Corporate Finance Services:

- Development financing and restructuring
- Financial due diligence
- Rescue, recovery & turnaround
- Mergers & acquisitions
- NTPF negotiations.

If you would like to seek advice on taking action from this report, BDO's Corporate Finance Healthcare team can assist you, contact us on **(061) 464 822** or email:



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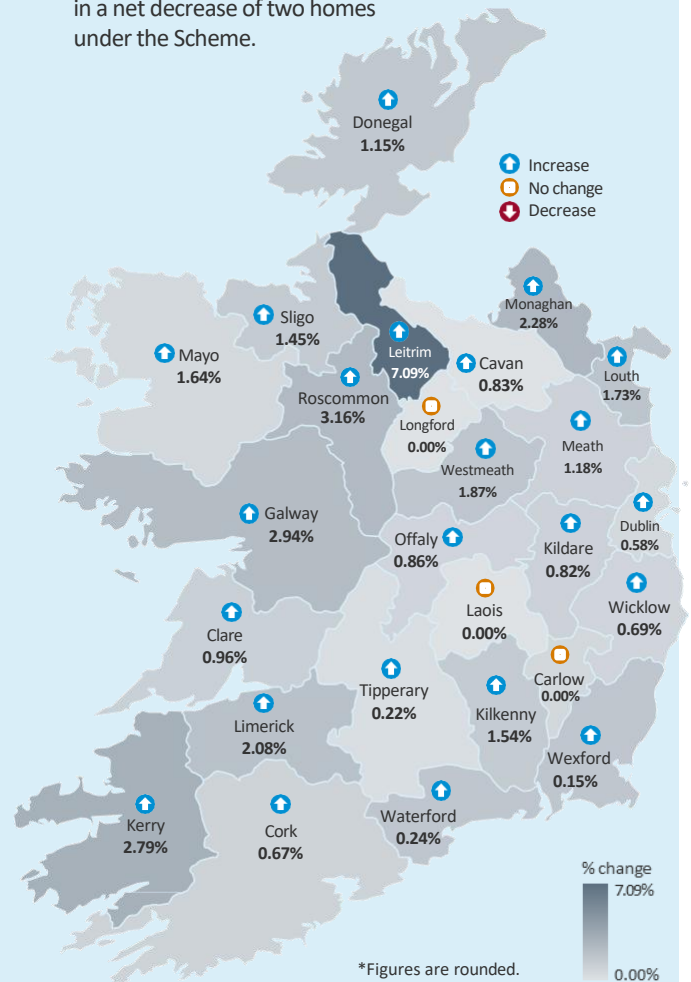
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NTPF weekly rates: Average quarterly % change* (June 2025 / September 2025)

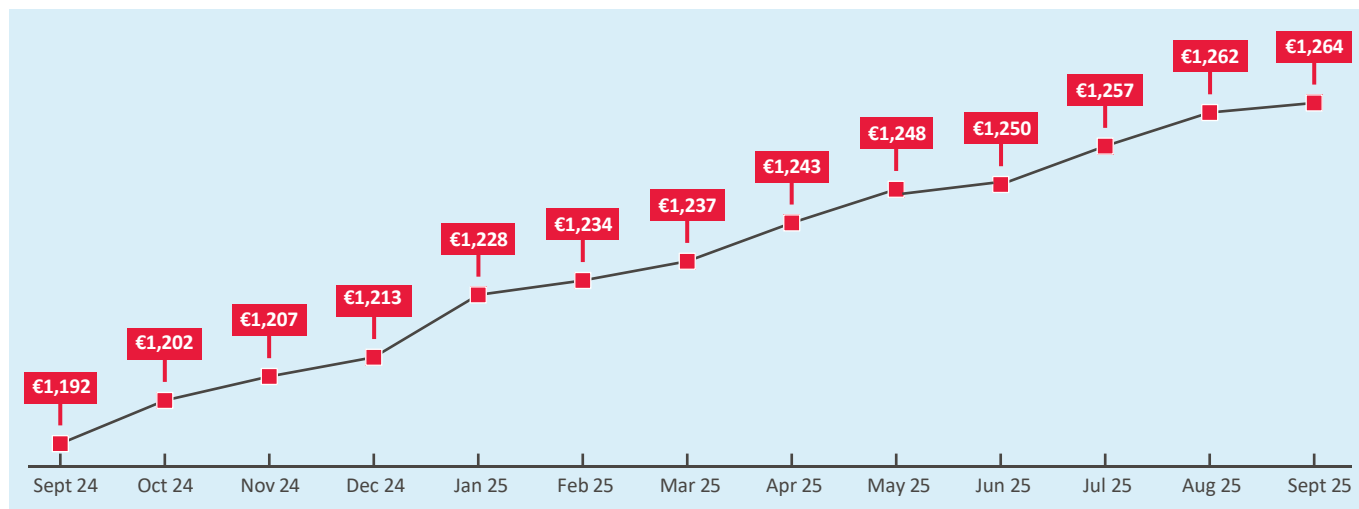
FDR comparison September 2025 vs June 2025

This map shows the quarterly average % change in agreed NTPF Fair Deal rates by county in September 2025 compared to the rates in June 2025 of voluntary and private nursing homes:

- The FDR changes are a result of successful negotiation between individual nursing homes and the NTPF to agree on a maximum price that the nursing home charges under the nursing home support scheme on a weekly basis.
- The country average weekly rate has increased by 1.13% from €1,250 in June 2025 to €1,264 in September 2025.
- 23 counties showed an increase in the weekly average NTPF Fair Deal rates in September compared to June, with the highest rate increase of 7.09% in Leitrim, where the average rate increased from €1,142 to €1,223. The lowest recorded increase of 0.15% was in Wexford, where the average weekly rate increased from €1,207 in June to €1,209 in September.
- Three counties (Carlow, Laois and Longford) showed no change in average FD rates compared to June 2025.
- There was one less home in Dublin, Laois and Waterford under the scheme in September 2025 compared to June 2025, and one additional home in Wexford. This resulted in a net decrease of two homes under the Scheme.



Last 12 months country average weekly FDR increases for Private & Voluntary Nursing Homes in Ireland



NTPF Agreed Weekly Fair Deal Rates*

COUNTY	JUN'25	SEPT '25	% CHANGE		SEPT '24	NO. OF NURSING HOMES UNDER FDR SCHEME			
						JUN'25	SEPT '25	CHANGE	
Carlow	1,204	1,204	○	0.00%	1,120	5	5	○	0
Cavan	1,227	1,237	↑	0.83%	1,152	7	7	○	0
Clare	1,189	1,201	↑	0.96%	1,121	12	12	○	0
Cork	1,250	1,259	↑	0.67%	1,186	47	47	○	0
Donegal	1,188	1,202	↑	1.15%	1,119	13	13	○	0
Dublin	1,367	1,375	↑	0.59%	1,326	87	86	↓	-1
Galway	1,182	1,217	↑	2.94%	1,131	30	30	○	0
Kerry	1,171	1,203	↑	2.79%	1,126	15	15	○	0
Kildare	1,289	1,300	↑	0.82%	1,236	20	20	○	0
Kilkenny	1,212	1,230	↑	1.54%	1,158	10	10	○	0
Laois	1,237	1,237	○	0.00%	1,174	5	4	↓	-1
Leitrim	1,142	1,223	↑	7.09%	1,142	2	2	○	0
Limerick	1,180	1,204	↑	2.08%	1,130	20	20	○	0
Longford	1,217	1,217	○	0.00%	1,154	3	3	○	0
Louth	1,231	1,252	↑	1.73%	1,192	9	9	○	0
Mayo	1,199	1,219	↑	1.64%	1,127	17	17	○	0
Meath	1,254	1,269	↑	1.18%	1,203	18	18	○	0
Monaghan	1,220	1,247	↑	2.28%	1,182	4	4	○	0
Offaly	1,203	1,213	↑	0.86%	1,140	5	5	○	0
Roscommon	1,172	1,209	↑	3.16%	1,131	7	7	○	0
Sligo	1,269	1,287	↑	1.45%	1,209	6	6	○	0
Tipperary	1,202	1,204	↑	0.22%	1,116	24	24	○	0
Waterford	1,231	1,233	↑	0.24%	1,160	8	7	↓	-1
Westmeath	1,164	1,186	↑	1.87%	1,103	8	8	○	0
Wexford	1,207	1,209	↑	0.15%	1,120	13	14	↑	1
Wicklow	1,286	1,295	↑	0.69%	1,235	18	18	○	0
COUNTRY AVERAGE	1,250	1,264	↑	1.13%	1,192	413	411	↓	-2

*Figures are rounded, Country average rates provided includes all private & voluntary nursing homes under the Fair Deal Scheme

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SOURCE OF INFORMATION

Health Service Executive(HSE):

<https://www2.hse.ie/services/fair-deal-scheme/about-the-fair-deal-scheme.html>