

Healthcare | BDO Corporate Finance

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 March 2025

Fair Deal Rate (FDR) Changes

March 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 December 2024 and March 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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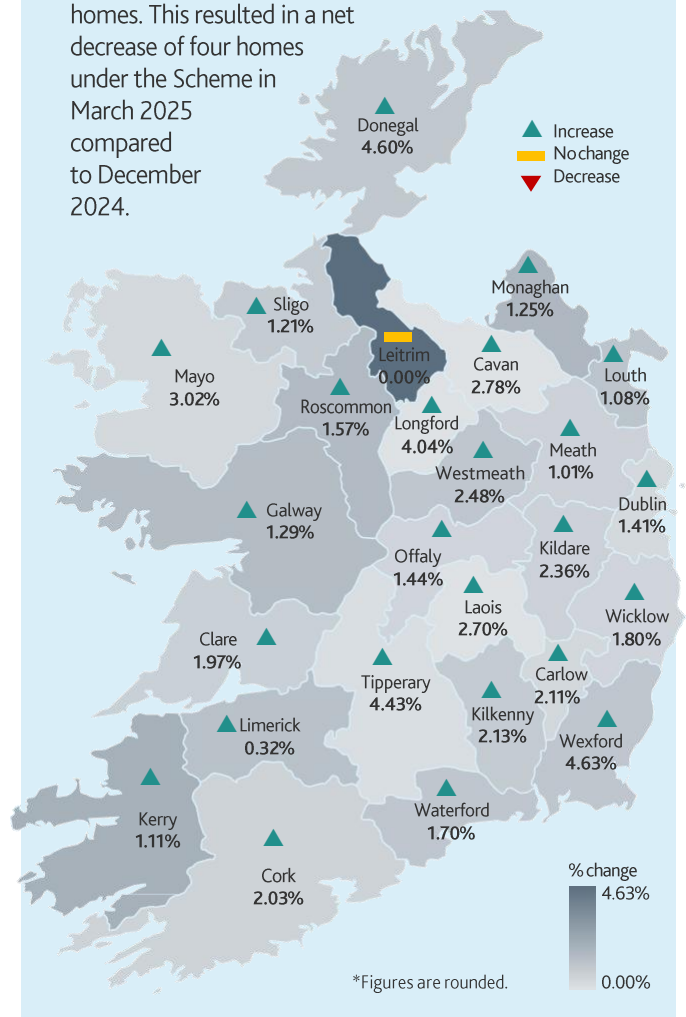
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NTPF weekly rates: Average quarterly % change* (December 2024/March 2025)

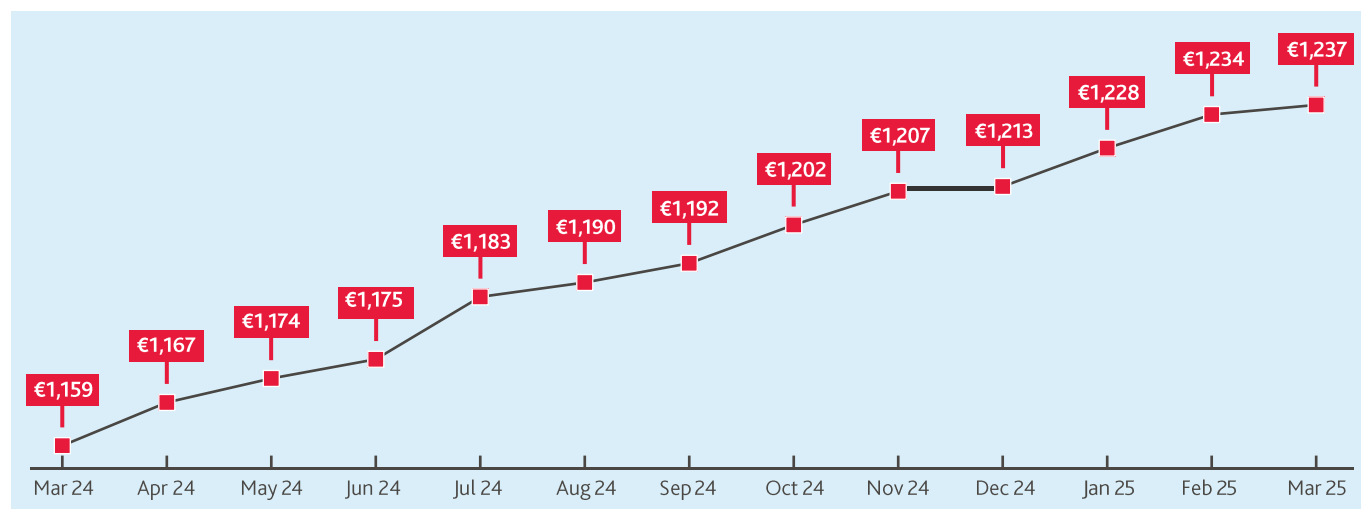
FDR comparison March 2025 vs December 2024

This map shows the quarterly average % change in agreed NTPF Fair Deal rates by county in March 2025 compared to the rates in December 2024 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 1.98% from €1,213 in December 2024 to €1,237 in March 2025.
- 25 counties showed an increase in the weekly average NTPF Fair Deal rates in March compared to December, with the highest rate increase of 4.63% in Wexford, where the average rate increased from €1,154 to €1,207. The lowest recorded increase of 0.32% was in Limerick, where the average weekly rate increased from €1,157 in December to €1,161 in March.
- One county (Leitrim) showed no change in average FD rates compared to December 2024.
- There was one less home each in Dublin, Galway, Roscommon, and Wicklow under the scheme in March 2025 compared to December 2024, and no additional homes. This resulted in a net decrease of four homes under the Scheme in March 2025 compared to December 2024.



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



NTPF Agreed Weekly Fair Deal Rates*

COUNTY	DEC '24	MAR '25	% CHANGE		MAR '24	NO. OF NURSING HOMES UNDER FDR SCHEME			
						DEC '24	MAR '25	CHANGE	
Carlow	1,137	1,161	▲	2.11%	1,078	5	5	▲	0
Cavan	1,193	1,227	▲	2.78%	1,145	7	7	▲	0
Clare	1,141	1,164	▲	1.97%	1,075	12	12	▲	0
Cork	1,208	1,233	▲	2.03%	1,148	47	47	▲	0
Donegal	1,125	1,176	▲	4.60%	1,083	13	13	▲	0
Dublin	1,339	1,358	▲	1.41%	1,302	88	87	▼	-1
Galway	1,151	1,165	▲	1.29%	1,082	30	29	▼	-1
Kerry	1,144	1,157	▲	1.11%	1,065	15	15	▲	0
Kildare	1,248	1,277	▲	2.36%	1,208	20	20	▲	0
Kilkenny	1,172	1,197	▲	2.13%	1,114	9	9	▲	0
Laois	1,185	1,217	▲	2.70%	1,137	5	5	▲	0
Leitrim	1,142	1,142	■	0.00%	1,041	2	2	▲	0
Limerick	1,157	1,161	▲	0.32%	1,075	20	20	▲	0
Longford	1,154	1,201	▲	4.04%	1,101	3	3	▲	0
Louth	1,208	1,221	▲	1.08%	1,150	9	9	▲	0
Mayo	1,151	1,185	▲	3.02%	1,090	17	17	▲	0
Meath	1,228	1,241	▲	1.01%	1,170	18	18	▲	0
Monaghan	1,205	1,220	▲	1.25%	1,129	4	4	▲	0
Offaly	1,177	1,194	▲	1.44%	1,109	5	5	▲	0
Roscommon	1,134	1,151	▲	1.57%	1,078	8	7	▼	-1
Sligo	1,241	1,256	▲	1.21%	1,176	6	6	▲	0
Tipperary	1,143	1,193	▲	4.43%	1,105	24	24	▲	0
Waterford	1,188	1,209	▲	1.70%	1,121	8	8	▲	0
Westmeath	1,136	1,164	▲	2.48%	1,065	8	8	▲	0
Wexford	1,154	1,207	▲	4.63%	1,112	13	13	▲	0
Wicklow	1,246	1,269	▲	1.80%	1,199	19	18	▼	-1
COUNTRY AVERAGE	1,213	1,237	▲	1.98%	1,159	415	411	▼	-4

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

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Health Service Executive(HSE):

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