



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 December 2025

Fair Deal Rate (FDR) Changes

December 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 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 September 2025 and December 2025. We also take this opportunity to highlight the changes in the rates between December 2024 and December 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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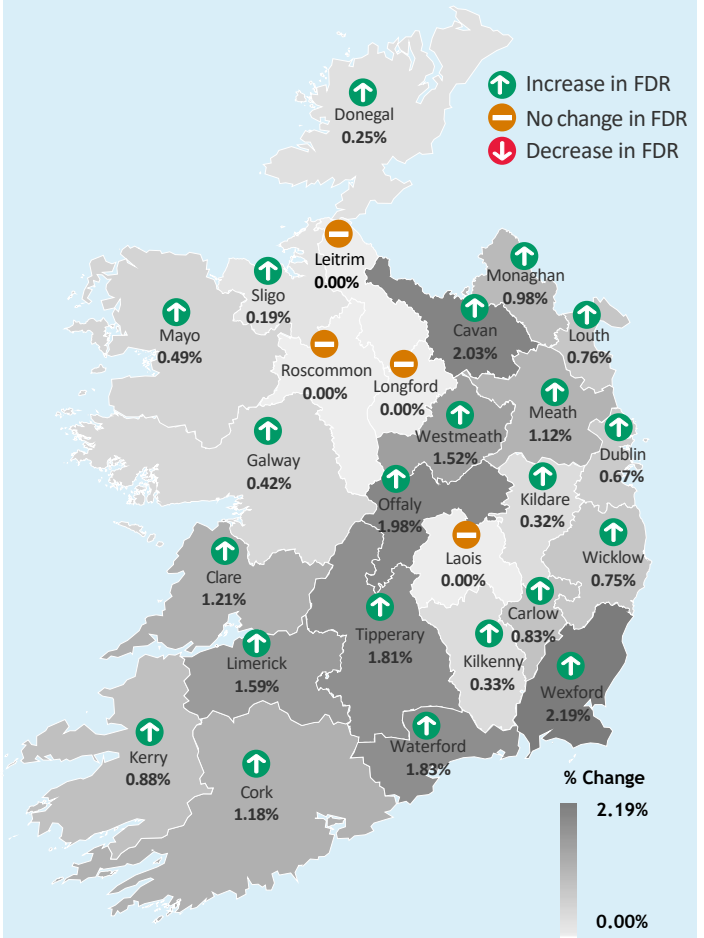
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NTPF weekly rates: Average quarterly % change* (September 2025 - December 2025)

FDR comparison December 2025 vs September 2025

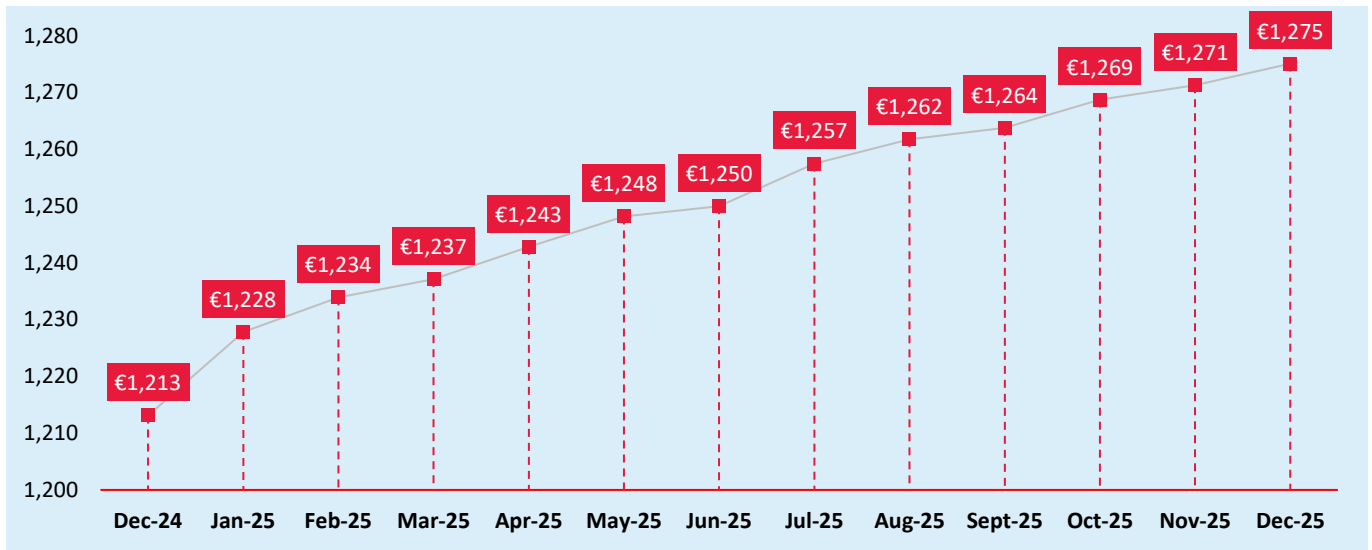
This map shows the quarterly average percentage change in agreed NTPF Fair Deal rates by county in December 2025, compared to the rates in September 2025 for the private and voluntary nursing homes:

- 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 0.89% from €1,264 in September 2025 to €1,275 in December 2025.
- 22 counties showed an increase in the weekly average NTPF Fair Deal rates in December 2025 compared to September 2025, with the highest rate increase of 2.19% in Wexford, where the average rate increased from €1,209 to €1,235. The lowest recorded increase of 0.19% was in Sligo, where the average weekly rate increased from €1,287 in September to €1,289 in December.
- Four counties (Laois, Leitrim, Longford, Roscommon) showed no change in average FD rates compared to September 2025.
- There was one less home in Dublin under the scheme in December 2025 compared to September 2025.



*Figures are rounded.

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

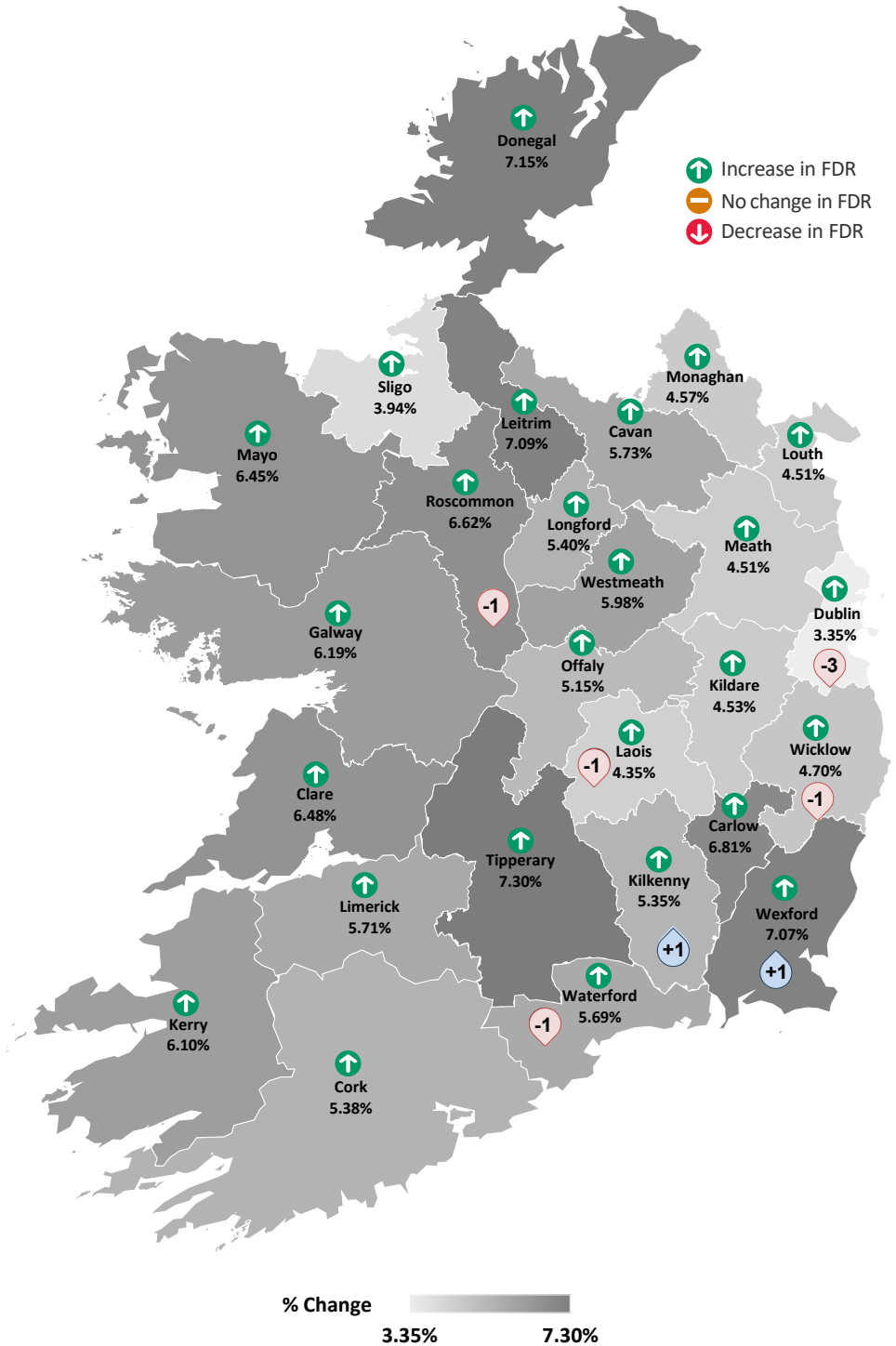
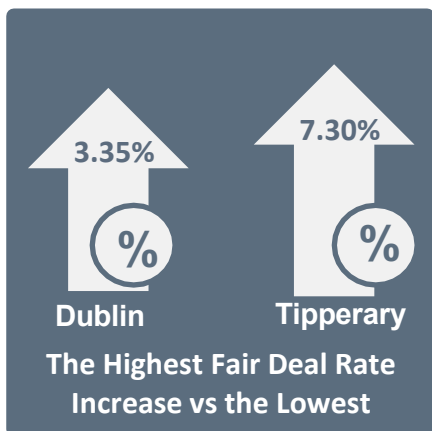
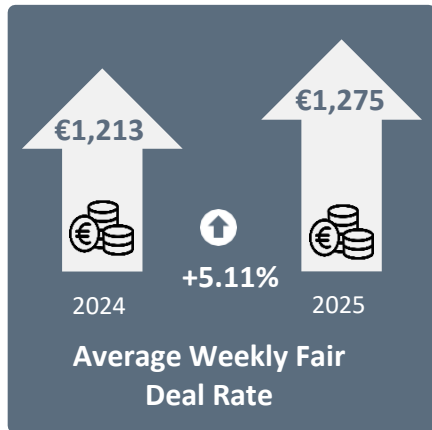


County	FDR (€)		% Change		Dec 24	No. of nursing homes under FDR scheme			
	Sept 25	Dec 25	Change	%		Sept 25	Dec 25	Change	Count
Carlow	1,204	1,214	↑	0.83%	1,137	5	5	→	0
Cavan	1,237	1,262	↑	2.03%	1,193	7	7	→	0
Clare	1,201	1,215	↑	1.21%	1,141	12	12	→	0
Cork	1,259	1,274	↑	1.18%	1,208	47	47	→	0
Donegal	1,202	1,205	↑	0.25%	1,125	13	13	→	0
Dublin	1,375	1,384	↑	0.67%	1,339	86	85	↓	-1
Galway	1,217	1,222	↑	0.42%	1,151	30	30	→	0
Kerry	1,203	1,214	↑	0.88%	1,144	15	15	→	0
Kildare	1,300	1,304	↑	0.32%	1,248	20	20	→	0
Kilkenny	1,230	1,234	↑	0.33%	1,172	10	10	→	0
Laois	1,237	1,237	→	0.00%	1,185	4	4	→	0
Leitrim	1,223	1,223	→	0.00%	1,142	2	2	→	0
Limerick	1,204	1,224	↑	1.59%	1,157	20	20	→	0
Longford	1,217	1,217	→	0.00%	1,154	3	3	→	0
Louth	1,252	1,262	↑	0.76%	1,208	9	9	→	0
Mayo	1,219	1,225	↑	0.49%	1,151	17	17	→	0
Meath	1,269	1,284	↑	1.12%	1,228	18	18	→	0
Monaghan	1,247	1,260	↑	0.98%	1,205	4	4	→	0
Offaly	1,213	1,237	↑	1.98%	1,177	5	5	→	0
Roscommon	1,209	1,209	→	0.00%	1,134	7	7	→	0
Sligo	1,287	1,289	↑	0.19%	1,241	6	6	→	0
Tipperary	1,204	1,226	↑	1.81%	1,143	24	24	→	0
Waterford	1,233	1,256	↑	1.83%	1,188	7	7	→	0
Westmeath	1,186	1,204	↑	1.52%	1,136	8	8	→	0
Wexford	1,209	1,235	↑	2.19%	1,154	14	14	→	0
Wicklow	1,295	1,305	↑	0.75%	1,246	18	18	→	0
COUNTRY AVERAGE	1,264	1,275	↑	0.89%	1,213	411	410	↓	-1

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

Snapshot of changes

December 2024 – December 2025



- Net Increase in Homes under the Fair Deal Scheme
- Net Decrease in the Number of 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>