



GeoDirectory Residential Buildings Report

Q2 2025

**Unique and up-to-date analysis
of the Irish housing market**

Backed
by:



This is the 23rd GeoDirectory Residential Buildings Report on the stock of residential properties in Ireland. The biannual report is based on GeoDirectory's comprehensive database of over 2 million residential building records and provides a unique and up-to-date analysis of the Irish housing market.

This report also presents average rent prices across local authorities and an affordability comparison on the cost of renting versus the cost of buying for first-time buyers in the Irish market.

This GeoDirectory Residential Buildings report provides some insights on the outturn for stock levels and vacancy rates across the country, as well as on construction activity, residential transactions and property prices. This report provides useful analysis and insight for communities, businesses and policy makers on changes in the composition and location of the Irish housing stock.

Contents

Executive Summary	4
Classification of Residential Dwellings	6
Stock of Apartments by County	6
Additions to the GeoDirectory Database by County	7
Analysis of Construction Levels by County	8
Analysis of Commencements Data	9
Composition of Housing Stock	11
Analysis of Transactions and Average Residential Property Prices	14
Average Rent Across the Counties	18
Affordability: First-Time Buyers - New Dwellings	19
Affordability: First-Time Buyers - Existing Dwellings	20
Affordability: Income Analysis	21
Appendix	22
About this report	24

Facts at a glance

Residential Dwellings Stock

2,187,222

Total stock of residential properties

671,071

Detached dwellings account for 30.7% of the total stock

624,604

Terraced housing account for 28.6% of the total stock

80,328

Vacant dwellings

19,821

Derelict dwellings

Residential commencements



40,804

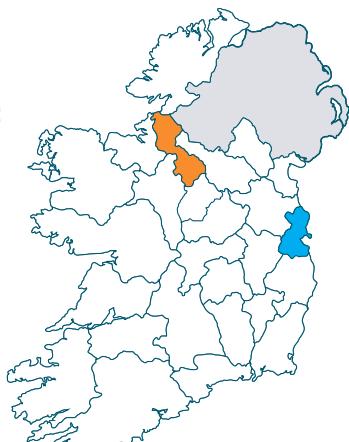
Residential commencements
12 months to June 2025

15,009

Co. Dublin had the highest number of residential commencements

89

Co. Leitrim had the lowest number of residential commencements



Property Transactions



47,927

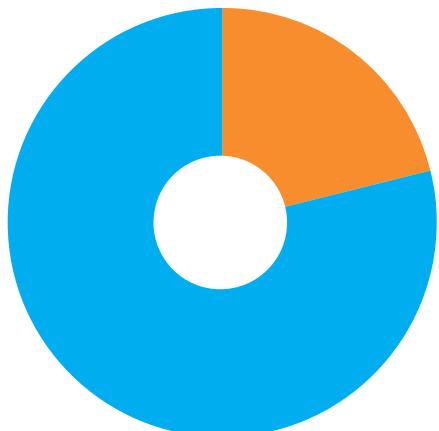
Total property transactions in the 12 months to June 2025

78%

Existing dwellings

22%

New dwellings



Buildings Under Construction



23,869

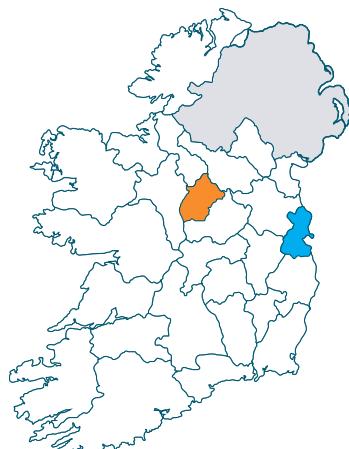
Buildings under construction, June 2025

3,979

Co. Dublin had the highest number of buildings under construction

125

Co. Longford had the lowest number of buildings under construction



National Property Price



€420,469

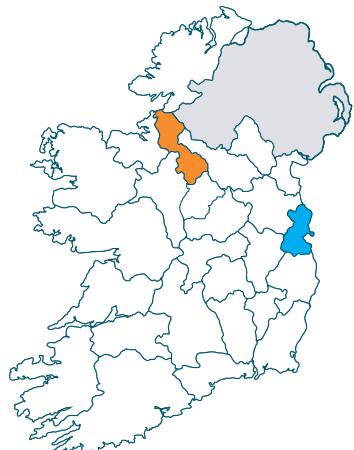
Average national property price

€585,754

Co. Dublin had the highest average property price

€204,323

Co. Leitrim had the lowest average property price



New addresses added



33,002

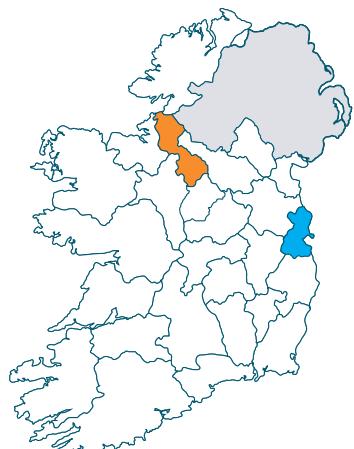
New addresses added to the GeoDirectory database

12,762

Co. Dublin had the highest number of new addresses added

126

Co. Leitrim had the lowest number of new addresses added



Executive Summary

This is the 23rd publication on the stock of residential properties in Ireland commissioned by GeoDirectory and prepared by EY Economic Advisory.



Ireland's residential stock totals almost 2.2 million dwellings of which over a quarter are located in Dublin alone

As of Q2 2025, the total stock of residential properties in Ireland was 2,187,222 dwellings. Detached dwellings (30.7%) continue to make up the largest share of this total, followed by terraced (28.6%) and semi-detached dwellings (24.7%). The number of apartments, which are defined as a dwelling which exists in a building of five or more dwellings, amounted to 238,714 units (10.9% of the total residential stock). This total equates to an increase of 12,205 units (or 5.1%) relative Q2 2024.

A total of 33,002 new residential addresses were added to the GeoDirectory database in the year to Q2 2025, comprising 1.5% of the total residential stock. The number of new address points witnessed an increase of 5.2% compared to the equivalent total in Q2 2024.

The Greater Dublin Area (GDA) accounted for just over half of all new address points (53.2%), while Dublin itself accounted for (38.7%) of new addresses added in the year to Q2 2025.

The number of buildings under construction grew by 9.2% year-on-year

The number of new buildings under construction recorded an increase of 9.2% in the year to Q2 2025. A total of 23,869 buildings were classified as being under construction in the GeoDirectory database in Q2 2025 compared with 21,851 in the corresponding period of 2024. Data on commencements, prepared by the DHLGH, indicates a total of 40,804 housing commencements were recorded in the 12 months to June 2025, representing a decrease of 21.3% or 11,017 units compared to the 12 months to June 2024.

The decrease in commencement notices followed the initial surge in 2024 from the introduction of the temporary development levy waiver and the Uisce Éireann connection charge rebate which were introduced in April 2023 to fast track more development and make projects more viable. It is noted that the recent figure of 40,804 is almost one and a half times the corresponding level of commencements in the 12 months to June 2023.

Vacancy rates decline YoY by 0.1 ppt in Q2 2025

80,328 dwellings were recorded as vacant in Q2 2025, according to the GeoDirectory database. The average vacancy rate across Ireland was 3.7% in Q2 2025, decreasing 0.1 ppts from the same period in 2024. Out of the 26 counties, 17 reported declines in vacancy rates compared to Q2 2024 figures. Dublin recorded the lowest vacancy rate at 1.1%, while Leitrim recorded the highest vacancy rate at 11.9%, despite a year-on-year decline of 0.03 ppts.

Average house prices climbed across all counties in the 12 months to June 2025

The national average house price during the 12 months to June 2025 was €420,469, up 9.8% versus the previous 12-month period to June 2024. Average house prices increased across all 26 counties. The largest percentage increases in average house prices were observed in Sligo (+19.3%), Longford (19.0%), and Cavan (18.0%). Dublin recorded the highest average house price (€585,754), followed by Wicklow (€489,436) and Kildare (€434,452). All other counties recorded house prices below the national average. Leitrim (€204,323), Longford (€215,655), and Roscommon (€217,199) posted the lowest average house prices across the 12 months to June 2025.

Only three counties reported an increase in the number of residential property transactions in the 12 months to June 2025. A total of 47,927 residential property transactions were recorded with a decrease of 1.6% in 12-month period to June 2025. Dublin (15,850), Cork (5,360) and Kildare (2,592) had the highest number of property transactions, accounting for 49.7% of total transactions.

All eight Irish local authority areas based in the cities saw an increase in average house prices in the 12-month period to June 2025. Properties in Dún Laoghaire-Rathdown (€772,375) remained the most expensive while properties in Waterford City were reported to have the lowest average house prices for an Irish city (€269,066). Cork City reported the highest YoY house price increase at 14.4% to €393,333.

Dublin 15 recorded the highest number of residential transactions across all Dublin postcodes with 1,703 properties sold during the 12 months to June 2025. Dublin 18 (1,151) and Dublin 24 (824) had the second and third highest levels of purchasing activity, while just 98 property sales were executed in each of Dublin 17 and Dublin 20. The highest average property price was recorded in Dublin 4 at €984,835. Dublin 10 remained the Dublin postcode with the lowest average house price at €319,549.

Based on the principal post town codes, residential property transaction volumes were highest in V94 Limerick (1,549), followed by H91 Galway (1,302), and T12 Cork Southside (1,300). In addition, new-build property sales were most concentrated in A92 Drogheda, where 582 new properties were sold in the 12 months to June 2025, followed by Wicklow (376) and A98 Bray (363).

Average rent prices continue to increase year-on-year

According to the Q4 2024 RTB Rent Index, the standardised average rent in new tenancies saw a YoY increase of 5.5%. The national standardised average monthly rent in new tenancies was €1,680 in Q4 2024, which is an increase of €88 compared to Q4 2023.

The Daft.ie Q1 2025 Rental Price Report reported the national average listed rent at €2,023, representing a 7.3% YoY increase. The Daft.ie Rental Report also reported Connacht/Ulster showing the highest provincial YoY increase (+6.9%), albeit the lowest rate of inflation in four years.

Affordability challenges continue for first-time buyers of new dwellings in some local authorities

Nationally, it is cheaper to buy than it is to rent if you are a first-time buyer of a new dwelling in 21 out of the 31 local authorities, despite continued increases in house prices. The average monthly rent price across the country in Q1 2025 was €2,023 versus the required monthly mortgage repayment of €1,809, based on the median new house price for the State of €420,000.

On average in the State, first time buyers looking to purchase an existing dwelling are better placed from an affordability

perspective, with the monthly mortgage repayment at €1,471, €552 less than the average monthly rent of €2,023. When broken down by local authority area, purchasing was also seen as the more affordable option for first time buyers, compared to renting, in all 31 local authorities, where the monthly mortgage repayments were lower compared with monthly rent prices.

Comparing median gross household income to the household income required to purchase a new dwelling based on the median new house price, there remains an income gap in households across all 31 local authorities.

On the other hand, existing house prices continue to tell a more positive story. Households in 12 local authorities are currently able to afford an existing dwelling based on current median gross household income. Additionally, it is cheaper to make mortgage repayments on an existing dwelling than to rent in all local authorities.

Stock of apartments continues to rise

In Q2 2025, apartments accounted for 10.9% of the national residential stock, equating to 238,714 dwellings, and representing an increase of 5.1%, or 12,205 units from Q2 2024. The number of apartments is growing steadily, with indications that this trend will continue. However, this figure could be considered an underestimation, as the data does not include apartments in buildings with four or less apartments, i.e. only includes apartments in apartment blocks.

Dublin contributed significantly to this growth, accounting for 80.5% of the additional units. The total number of apartments in Dublin reached 159,926, which is 67.6% of all apartments across the State. Notability, apartments represent 26.2% of all addresses in Dublin, meaning that over 1 in 4 address points are now in an apartment block.

Cork had the next highest share, albeit substantially lower than Dublin, making up 6.7% of the national stock, followed by Galway at 3.6% and Limerick at 2.7%.

Classification of Residential Dwellings

There was a total of 2,187,222 residential dwellings* across Ireland in Q2 2025. This equated to an increase of 35,886 dwellings (+1.7%) since Q2 2024

Detached dwellings remained the most prevalent residence type in Q2 2025 (30.7% of the national total), followed by terraced dwellings (28.6%), and semi-detached (24.7%).

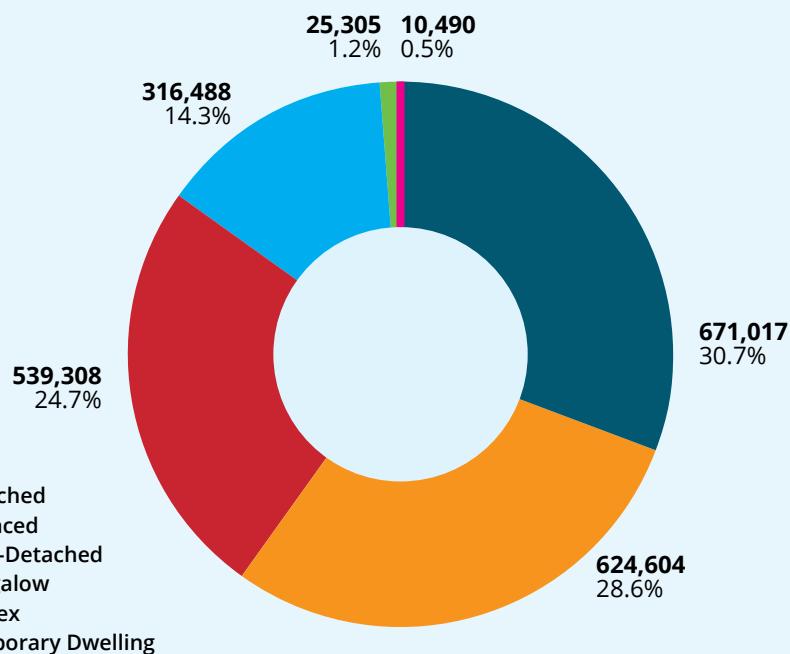
In total, there were 671,017 detached dwellings in Q2 2025, which make up the largest proportion of dwellings in rural counties such as Leitrim (49.3% of the county total), Donegal (48.1%), and Cavan (47.8%). Conversely, Dublin ranked lowest (17.5%) followed by Louth (23.9%).

There were 624,604 terraced dwellings, with the greatest shares found in Dublin (49.1% of the county total), Louth (32.3%), and Waterford (30.2%).

Kildare (38.2%), Dublin (29.4%), and Meath (29.7%) were the counties with the highest proportions of semi-detached properties.

* Excluding derelicts

Figure 1:
Residential Dwellings by Building Type in Ireland, Q2 2025



Source: GeoDirectory Database

Stock of Apartments by County

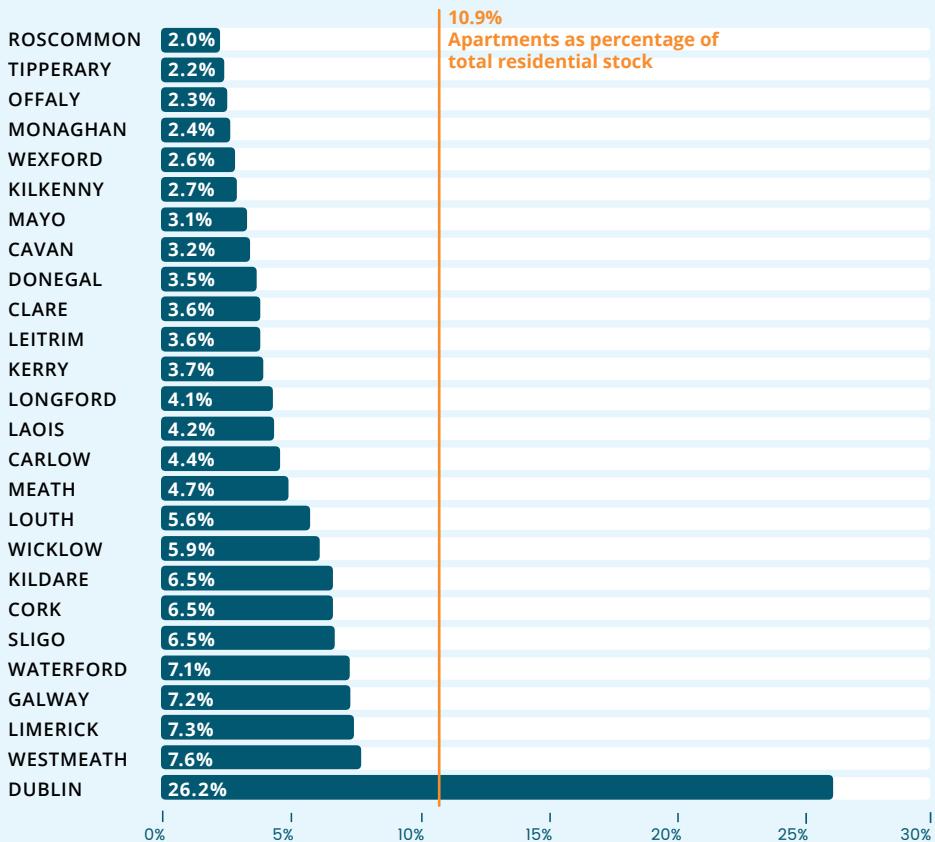
Apartments* accounted for 10.9% of the national residential stock in Q2 2025, equating to 238,714 dwellings. This represented an increase of 12,205 units (+5.1%) from Q2 2024.

Dublin accounted for 80.5% of these additional units. The total number of Dublin's apartment stock (159,926 units) equated to 67.0% of all apartments across the State in Q2 2025.

Cork had the next highest share, accounting for 6.7% of the national stock, followed by Galway at 3.6% and Limerick at 2.7%.

Dublin (26.2%), Westmeath (7.6%) and Limerick (7.3%) had the highest shares of apartments relative to their overall residential stock. Roscommon had the lowest share of apartments at 2.0%.

Figure 2.
Apartments as a Percentage of Total Residential Stock by County, Q2 2025



Source: GeoDirectory Database

*An apartment is a dwelling which exists in a building of 5 or more dwellings.

Additions to the GeoDirectory Database by County

In the 12 months to June 2025, a total of 33,002 new addresses* were added to the GeoDirectory database, equating to 1.5% of the total residential stock.

The number of new residential address points increased by 5.2% YoY, meaning a further 1,618 were added.

Dublin accounted for the largest proportion of new address points with 12,762 added (38.7% of total), followed by Cork (10.2%), Meath (5.5%) and Kildare (5.3%).

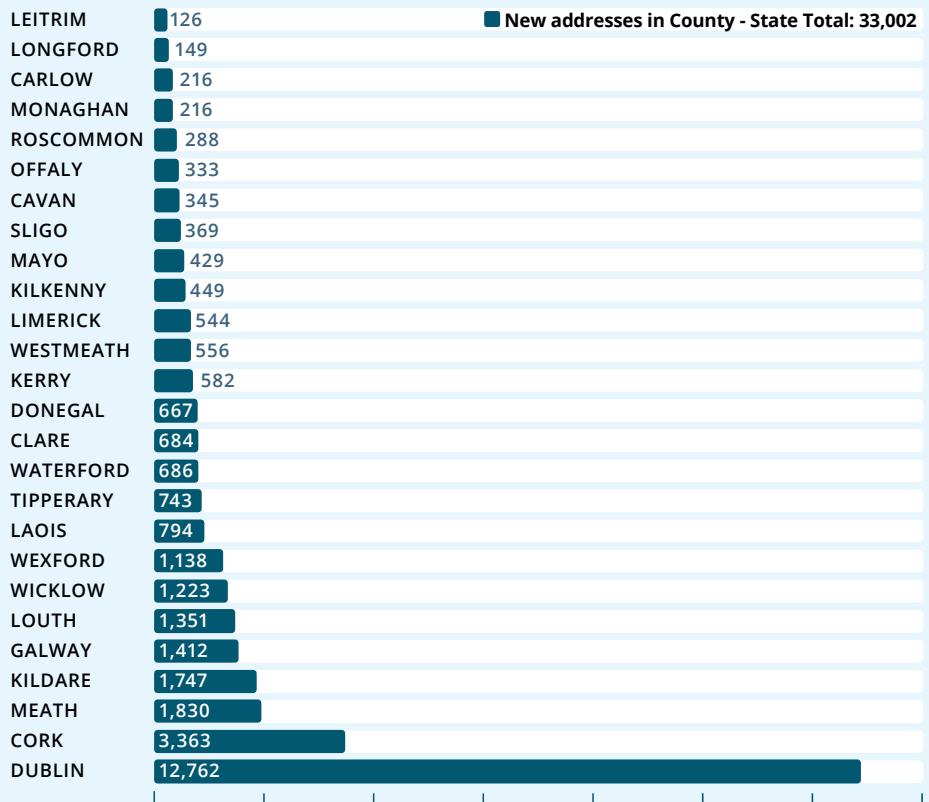
All other counties had shares of less than 5.0% of the total additions, with the smallest additions being made in Leitrim (0.4%), and Carlow (0.7%).

More than half (53.2%) of the total number of new addresses added were in the Greater Dublin Area**. When Cork, Galway, Limerick, and Waterford are included, this share rises to 71.4%.

In percentage terms, Roscommon (80.0% YoY), Tipperary (58.4%) and Sligo (46.4%) recorded the highest YoY growth in the number of new addresses added, accounting for about 4.2% i.e., total increase of 1,400 address points over 12 months.

On a provincial level, Leinster accounted for 22,548 of the new addresses added, equivalent to 68.3% of the total. Munster represented 20.0% of the total new address points, followed by Connacht (8.0%) and Ulster (3.7%).

Figure 3.
New Addresses added to the Stock of Residential Dwellings by County



Source: GeoDirectory Database

Table 1:
Percentage of New Addresses Added to the Total Stock by County and State and Year-on-Year Change

County	New addresses as % of total county stock	New addresses as % of total stock	% YoY change in new addresses added
CARLOW	0.9%	0.7%	-32.9%
CAVAN	1.0%	1.0%	35.3%
CLARE	1.2%	2.1%	31.8%
CORK	1.4%	10.2%	-7.1%
DONEGAL	0.8%	2.0%	-6.8%
DUBLIN	2.1%	38.7%	21.5%
GALWAY	1.2%	4.3%	9.2%
KERRY	0.8%	1.8%	-13.5%
KILDARE	1.8%	5.3%	9.3%
KILKENNY	1.1%	1.4%	-32.9%
LAOIS	2.2%	2.4%	-3.8%
LEITRIM	0.7%	0.4%	-16.0%
LIMERICK	0.6%	1.6%	-48.9%
LONGFORD	0.8%	0.5%	20.2%
LOUTH	2.4%	4.1%	10.8%
MAYO	0.6%	1.3%	-11.7%
MEATH	2.2%	5.5%	1.0%
MONAGHAN	0.8%	0.7%	-23.4%
OFFALY	1.0%	1.0%	-32.3%
ROSCOMMON	0.9%	0.9%	80.0%
SLIGO	1.1%	1.1%	46.4%
TIPPERARY	1.1%	2.3%	58.4%
WATERFORD	1.2%	2.1%	4.3%
WESTMEATH	1.5%	1.7%	-22.0%
WEXFORD	1.5%	3.4%	3.2%
WICKLOW	1.9%	3.7%	-12.6%

Source: GeoDirectory Database

*New Addresses added also include new student accommodation units.

**The Greater Dublin Area is defined as Dublin and the counties of the East region, Kildare, Meath, and Wicklow.

Analysis of Construction Levels by County

As of Q2 2025, there were 23,869 buildings* under construction according to the GeoDirectory database, equating to an increase of 2,018 buildings (9.2%) versus Q2 2024

Dublin continues to record the highest levels of new construction activity, accounting for 16.7% of all buildings under construction.

After Dublin, building levels were highest in Cork (12.0% of total), Kildare (8.0%) and Meath (7.1%).

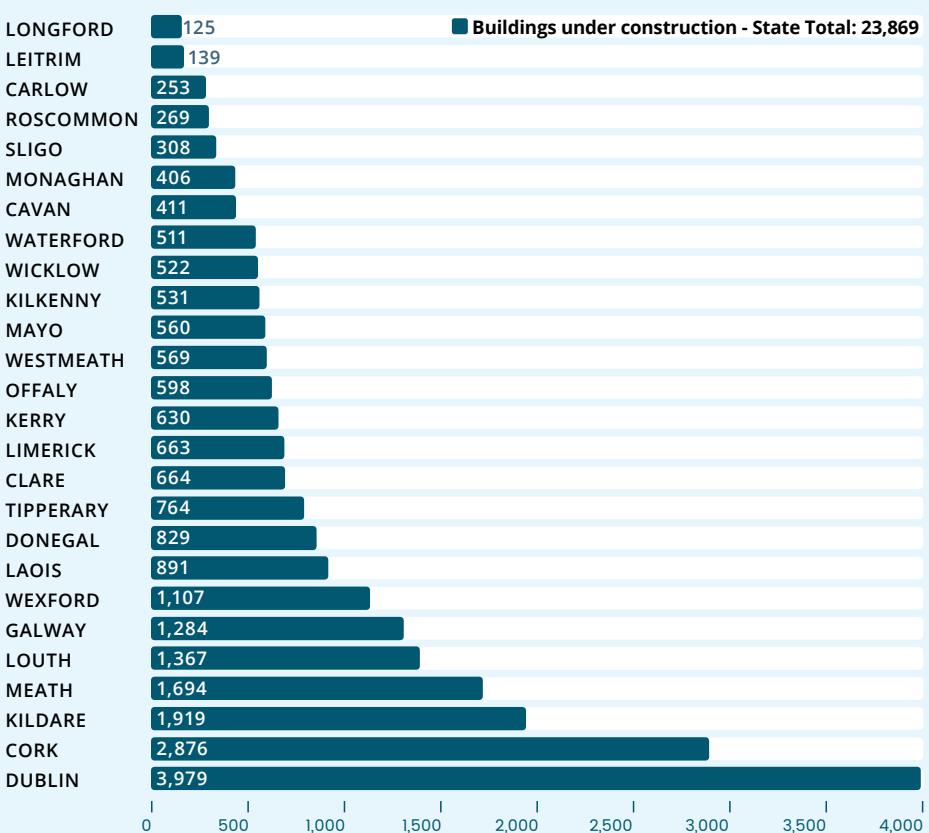
All remaining counties registered shares of 5.7% and below, with activity weakest in Longford and Leitrim accounting for 0.5% and 0.6% respectively.

The Greater Dublin Area accounted for 34.0% (or 8,114 buildings) of total construction activity in Q2 2025, up 10.3% (or 758 buildings) on the same period in 2024.

Construction activity remained strongest in Leinster, which accounted for 56.8% of all buildings under construction in Q2 2025, with Munster ranking second (25.6% of national total). Building levels were lowest in Ulster and Connacht, with shares of 6.9% and 10.7% respectively.

*Note these are buildings as opposed to address points or dwelling units. Buildings under construction are only counted as buildings and not dwellings.

Figure 4:
Total Construction Activity by County, Q2 2025



Source: GeoDirectory Database

Table 2:
Percentage of Construction Activity by County, Q2 2025

County	% of state construction activity
DUBLIN	16.7%
CORK	12.0%
KILDARE	8.0%
MEATH	7.1%
LOUTH	5.7%
GALWAY	5.4%
WEXFORD	4.6%
LAOIS	3.7%
DONEGAL	3.5%
TIPPERARY	3.2%
CLARE	2.8%
LIMERICK	2.8%
OFFALY	2.6%
WESTMEATH	2.4%
MAYO	2.3%
KILKENNY	2.2%
WICKLOW	2.2%
WATERFORD	2.1%
CAVAN	1.7%
MONAGHAN	1.7%
SLIGO	1.3%
ROSCOMMON	1.1%
CARLOW	1.1%
LEITRIM	0.6%
LONGFORD	0.5%

Source: GeoDirectory Database

Analysis of Commencements Data

A total of 40,804 housing commencements were recorded in the 12 months to June 2025, representing a decrease of -21.3% or 11,017 units.

6,325 of these commencements were in the first six months of 2025, down 82% from the same period in 2024. The decrease in the number of units commenced followed the exceptional surge in 2024 following the introduction of the temporary development levy waiver and the Uisce Éireann connection charge rebate in April 2023 to fast track more development and make projects more viable.

Due to the above measures, it is worth noting that 51,821 units were commenced in the 12 months to June 2024 compared with 28,369 in the same period to June 2023. The latest figure of 40,840 is almost one and a half times the corresponding figure in the same period to May 2023.

The Greater Dublin Area accounted for 21,885 commencements (53.6% of the national total) in the 12 months to June 2025, of which Dublin comprised of 15,009 units (36.8% of the national total).

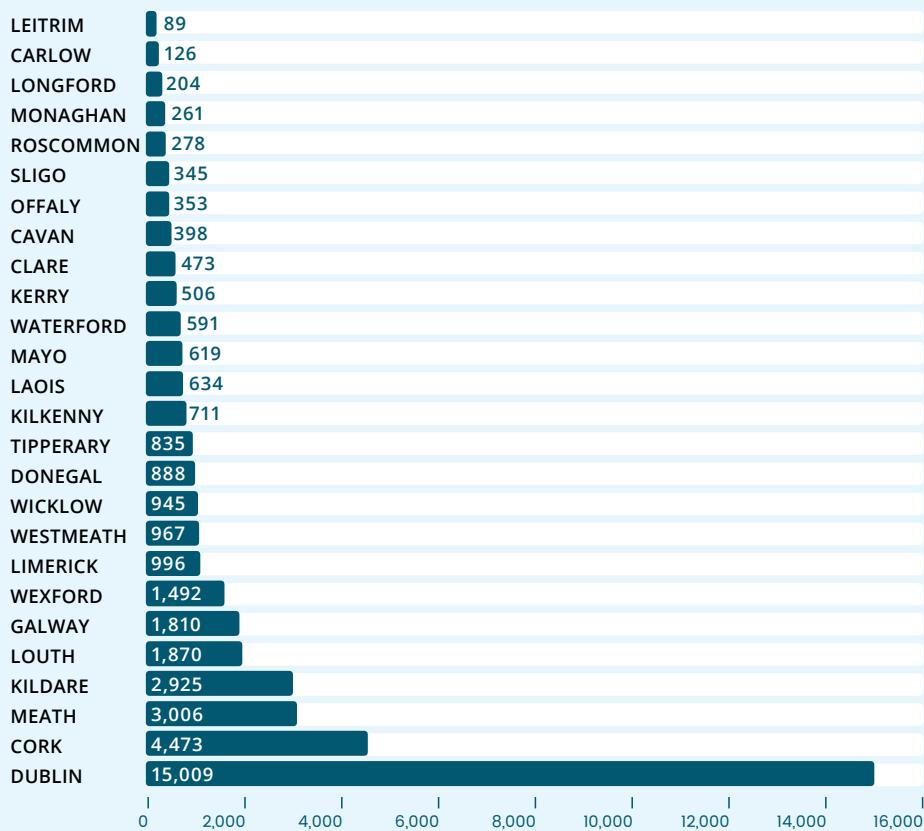
Only 6 out of 26 counties registered an increase in the number of housing units commenced during the 12 months to June 2025, relative to the corresponding period to June 2024, with Longford and Roscommon increasing 110.3% and 100.0% respectively. In contrast, Carlow and Laois recorded a fall of 73.4% and 58.3% respectively. These increases may suggest a change in attitude towards life in more rural counties, because of the continued rise of prices in Ireland's cities.

After Dublin, the highest commencement levels in absolute terms in this period were in Cork (4,473), Meath (3,006), and Kildare (2,925). The lowest levels were in Leitrim (89) and Carlow (126).

On a provincial level, Leinster accounted for 69.2% of total commencements. This share is up by 2.6 ppts compared with the equivalent 12-month period to June 2024, despite an actual decrease of 6,257 commencements.

On the other hand, Ulster accounted for just 3.8% of commencements during this period. Munster and Connacht accounted for 19.3% and 7.7% of the total respectively.

Figure 5: Residential Commencements by County, 12 months to June 2025



Source: Department of Housing, Local Government and Heritage (DHLGH)

Housing Statistics

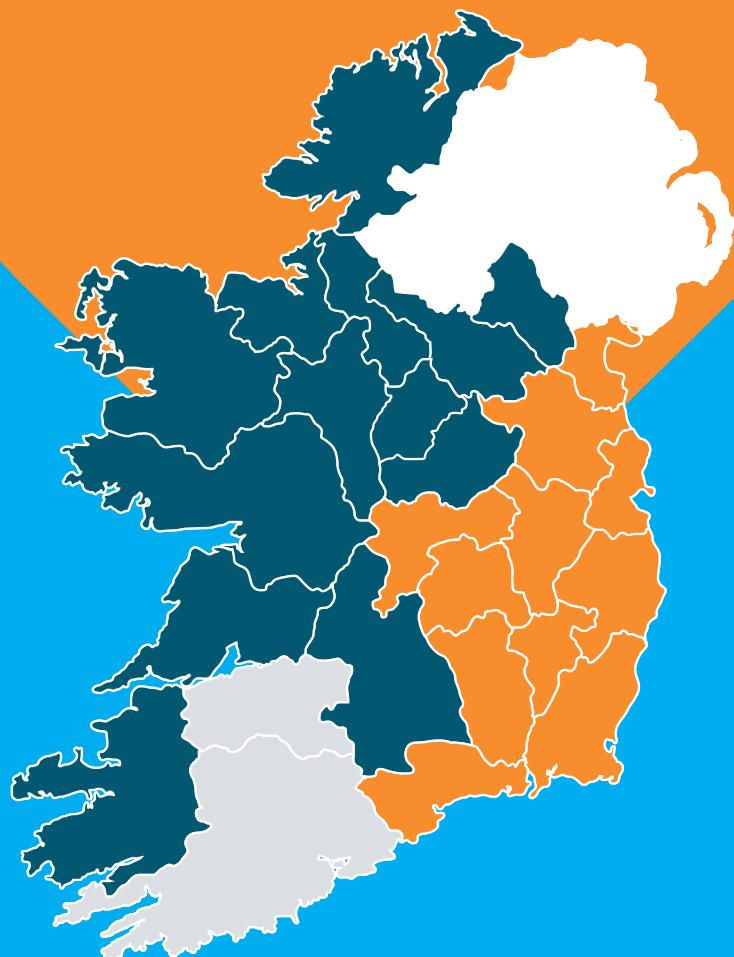
According to DHLGH, a total of 40,804 dwellings were commenced in the 12 months to June 2025. Though not strictly comparable, the GeoDirectory database indicates that 23,869 buildings (each of which can be one or more dwellings) were classified as being under construction as of Q2 2025.

A breakdown by type of unit commenced shows that a total of 17,301 apartments were commenced in the 12 months to June 2025 compared with 21,635 in the 12 months to June 2024 and 11,795 apartment commencements in the preceding 12-month period. As with the total units commenced, the latest figure of 17,301 apartments is almost one and a half times the corresponding figure in the same period to June 2023.

Separately the CSO publish data on "New Dwelling Completions." The latest CSO release reported that there were 9,214 new dwelling completions in Q2 2025, equating to an increase of 35.0% relative to the same quarter in 2024. Within the Q2 total completions, there were 3,053 apartment completions, 33.1% of the total.

The total number of completions over the four quarters to Q2 2025 was 32,717, 4.7% higher than the corresponding number in the same period of 2024. Apartments accounted for 10,445 or 31.9% of the total over the 4 quarters to Q2 2025. The corresponding figure in the same period in 2024 was 10,441.

National average vacancy rate decreased to 3.7%



13 counties had
vacancy rates above
the national average



11 counties had
vacancy rates below
the national average



2 counties had the
same vacancy rate as
the national average

Composition of Housing Stock

Vacancy rates

There were 80,328 dwellings recorded as vacant in Q2 2025, according to the GeoDirectory database. The state vacancy rate* across Ireland was 3.7% in Q2 2025, decreasing 0.02% from Q2 2024.

Vacancy rates decreased YoY in 17 counties.

Dublin recorded the lowest vacancy rate at 1.1% in Q2 2025, followed by Kildare (1.6%), Waterford (2.1%) and Carlow (2.5%).

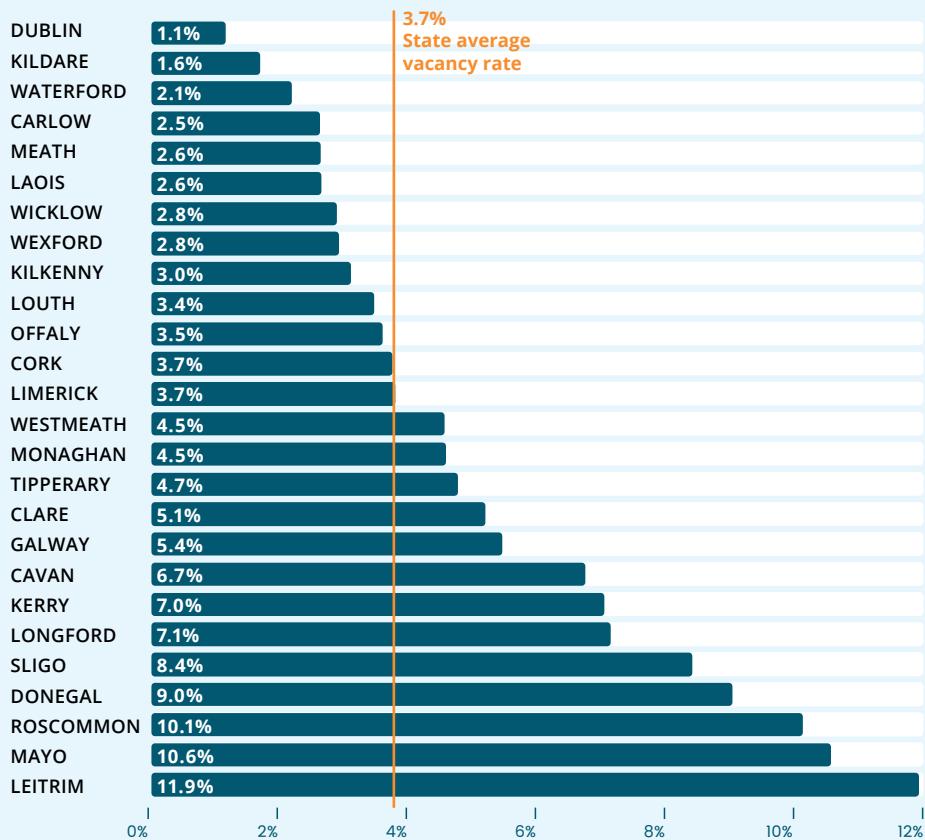
Despite falling by 0.03 ppts, Leitrim recorded the highest vacancy rate at 11.9%, 1.3 ppts higher than Mayo (10.3%).

Roscommon (10.1%) and Donegal (9.0%) registered the next highest vacancy rates. Correspondingly, Connacht had the highest vacancy rates (9.3%) in Q2 2025.

Leinster continues to have the lowest average vacancy rate at 3.1%. All counties to record vacancy rates below the national average were in Leinster.

*Vacant addresses as a proportion of the total residential stock, excluding buildings under construction and derelicts

Figure 6:
Vacancy Rate (%) by County, Q2 2025



Source: GeoDirectory Database

Derelict Address Points

Unique to GeoDirectory is the capture of Ireland's derelict* residential address points. As of Q2 2025, there were a total of 19,821 derelict units scattered nationwide. This total is 2.9% lower than the corresponding total in Q2 2024.

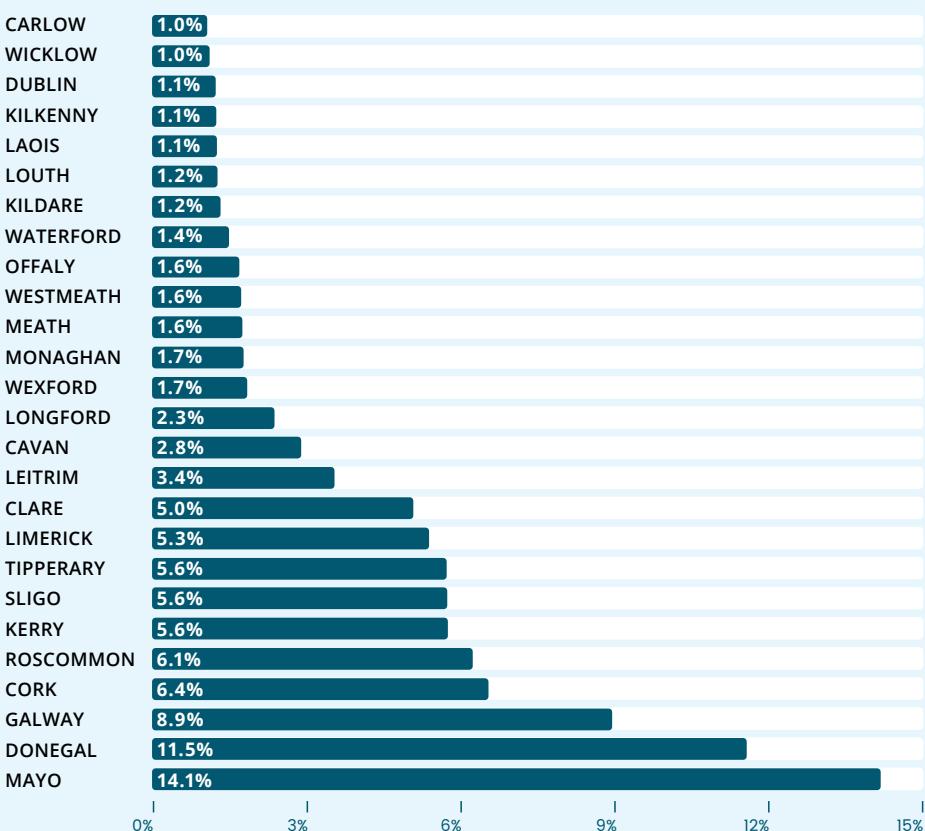
All counties saw the number of derelict address points decline relative to Q2 2024.

Derelict address points continue to be concentrated along the west coast of Ireland, with Mayo registering the highest concentration of derelict address points (14.1% of national total), followed by Donegal (11.5%) and Galway (8.9%).

Connacht had 7,567 (38.2% of national total) derelict address points, more than any other province. The number of derelict residential units in Ulster amounted to 3,159 (15.9%), which constituted the smallest share amongst all four provinces.

*A building is classified as derelict when structural work/reconstruction is needed before it can be re-occupied, usually leaving the building dormant for several years.

Figure 7:
Derelicts by County, Percentage Shares of State Total, Q2 2025



Source: GeoDirectory Database

Composition of Housing Stock continued

Breakdown of housing stock

The average national occupancy rate remained steady, with Dublin at close to 100% (98.9%)

The average occupancy rate across the State was 94.6% in Q2 2025, up 0.3 ppts relative to Q2 2024.

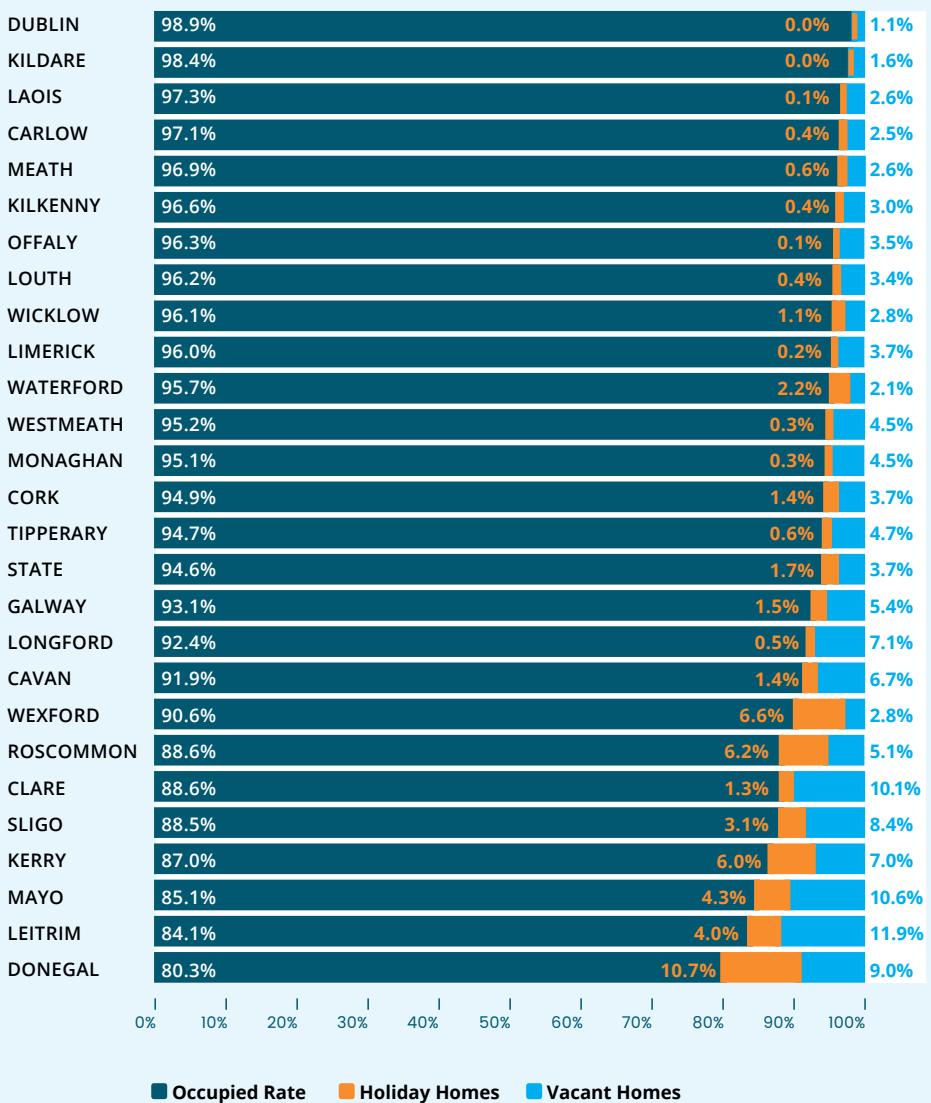
In total, 11 of the 26 counties registered occupancy rates below the national average.

Dublin (98.9%), Kildare (98.4%) and Laois (97.3%) recorded the highest occupancy rates. Donegal recorded the lowest occupancy rate at 80.3%, up 0.4 ppts from Q2 2024.

Donegal accounted for the highest proportion of total holiday homes (25.3%), followed by Wexford (13.3%), Kerry (12.2%) and Clare (9.7%). Together, they accounted for 60.5% of the national holiday home total (22,406 of 37,051 units) in Q2 2025.

Note: Stock figures exclude under construction and derelict

Figure 8:
Composition of Housing Stock by County, Percentage Shares, Q2 2025



Source: GeoDirectory Database

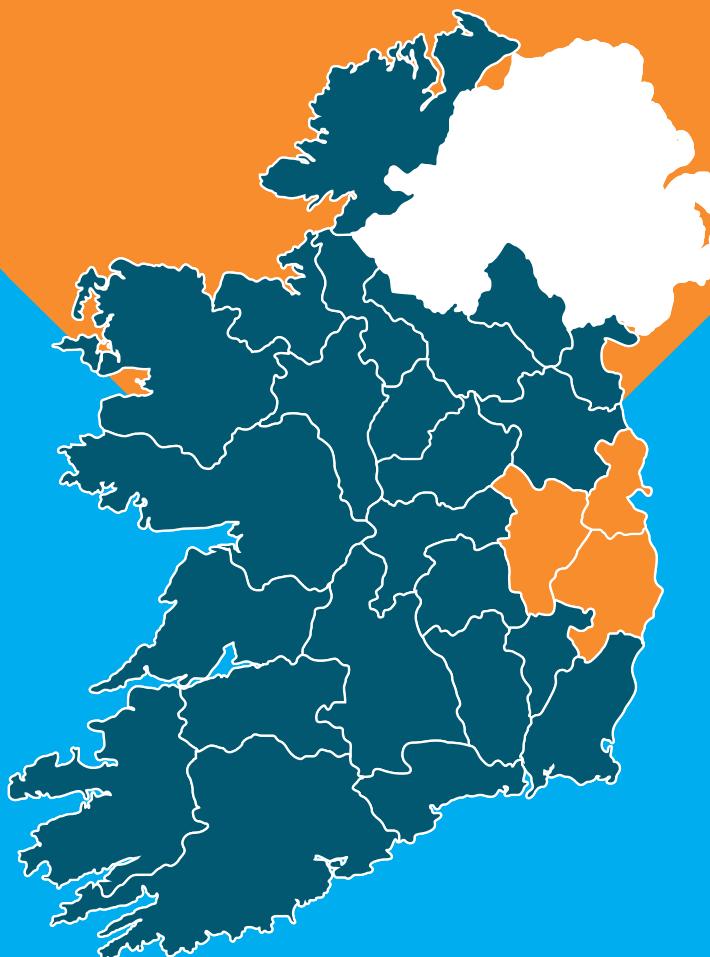


**Rochtaí láithreach ar na
praghsanna réadmhaoine is déanaí**



Cuir cumhacht aip GeoFindIT ag obair duit. Ioslódáil anois, saor in aisce.

National average house price increased to €420,469



3 counties recorded house prices above the State average



23 counties recorded house prices below the State average

Analysis of Transactions and Average Residential Property Prices

Total transactions – Ireland

The number of residential property transactions fell by 1.6% with a total of 47,927 properties purchased across Ireland in the 12 months to June 2025, reflecting a decrease of 802 transactions YoY.

The number of residential property transactions increased in only five out of 26 counties in the 12 months to June 2025.

Dublin (15,850), Cork (5,360) and Kildare (2,592) had the highest number of property transactions, accounting for 49.7% of the total between them.

The volume of transactions was lowest in Monaghan (308), Longford (313) and Leitrim (347).

New dwellings accounted for 22.2% (or 10,622 units) of all properties sold in the 12 months to June 2025.

Wicklow (41.3%), Louth (38.2%) and Kildare (36.0%) had the highest concentration of new dwelling sales and made up 25.6% of the national total.

The average house price rose in all 26 counties over the 12 months to June 2025, with Sligo experiencing the largest increase, where house prices rose €44,669 YoY (+19.3%). The lowest increase was seen in Wicklow, increasing by €13,912 YoY (+2.9%).

The national average house price increased by 9.8% in this period, reaching €420,469.

Average house prices were highest in Dublin (€585,754) across the 12 months to June 2025. Removing Dublin prices, the national average house price falls to €338,797.

Two other counties to record house prices above the State average were Wicklow (€489,436) and Kildare (€434,452).

The lowest average house prices were recorded in Leitrim (€204,323), Longford (€215,655) and Roscommon (€217,199).

The following tables provide a summary of residential property transactions over the 12 months to June 2025, along with the average price in each area. The data is provided for counties, city council areas and Dublin postal code areas.

Table 3:
Residential Property Transactions and Average House Price by County

Counties	Total transactions	% of which new dwellings	Average property price (€)
DUBLIN	15,850	19.9%	€585,754
CORK	5,360	29.4%	€380,224
KILDARE	2,592	36.0%	€434,452
WICKLOW	2,215	41.3%	€489,436
MEATH	2,185	33.2%	€395,378
GALWAY	1,909	14.9%	€364,536
WEXFORD	1,774	20.7%	€300,902
LIMERICK	1,640	21.5%	€321,159
LOUTH	1,499	38.2%	€332,688
WATERFORD	1,228	22.2%	€306,840
DONEGAL	1,126	10.0%	€218,739
TIPPERARY	1,077	8.3%	€255,525
MAYO	1,072	6.4%	€237,407
KERRY	1,021	5.7%	€301,567
LAOIS	957	29.8%	€290,387
CLARE	944	11.2%	€305,826
KILKENNY	844	25.9%	€333,768
WESTMEATH	824	16.5%	€306,189
OFFALY	628	13.5%	€268,631
SLIGO	624	15.2%	€275,801
CAVAN	571	10.0%	€250,438
ROSCOMMON	564	6.9%	€217,199
CARLOW	455	14.3%	€270,110
LEITRIM	347	6.3%	€204,323
LONGFORD	313	1.0%	€215,655
MONAGHAN	308	8.4%	€230,844
STATE	47,927	22.2%	€420,469
STATE EXCLUDING DUBLIN	32,077	23.3%	€338,797

Source: CSO. Data is based on residential property transactions data for the 12 months to June 2025. The following options were selected when downloading the data: Household Buyer - All, Executions.

Total transactions – City Council areas
Dublin City continued to register the highest number of residential transactions out of all city councils, with 5,485 units purchased over the 12 months to June 2025.

Four of the eight city council areas recorded an increase in the number of residential property transactions over the 12 months to June 2025, with Fingal reporting the highest YoY increase (+21.0%). Galway City experienced the largest absolute decline (-185 transactions) and percentage decline (-21.0%).

Limerick City reported the fewest number of transactions (555), a 0.7% increase compared to the same period 12 months prior.

Average property prices rose in all of the eight city council areas. Prices were highest in Dún Laoghaire-Rathdown (€772,375) and lowest in Waterford City (€269,066).

Average property prices rose YoY in South Dublin (9.4%), Fingal (9.3%), with Dublin City and Dun-Laoghaire Rathdown increasing at the same rate (8.1%).

Outside of the Capital, Cork City was the city council area with the highest average property price, at €393,333, a 14.4% YoY increase.

Total transactions – Dublin city postcodes

Dublin 15 remained the Dublin postcodes with the highest level of residential transactions, with 1,703 properties sold in the 12 months to June 2025.

Dublin 18 (1,151) and Dublin 24 (824) had the second and third strongest levels of purchasing activity, respectively.

Purchasing activity increased in 10 of the 22 Dublin postcodes in the 12 months to June 2025, compared to the same period to June 2024. YoY transactions volume growth was most buoyant in Dublin 15 (+32.8%) and Dublin 22 (+28.9%).

The share of transactions which were new properties was highest in Dublin 22 (46.9%) and Dublin 15 (41.6%). Dublin 1, Dublin 8, Dublin 10, and Dublin 12 recorded no new property sales, while Dublin 20 and Dublin 17 recorded just one and two new property sales respectively in the 12 months to June 2025.

Over the 12 months to June 2025, the highest average property price was recorded in Dublin 4 at €984,835 followed by Dublin 6 at €917,471. This is significantly higher than the next highest postcode, which is Dublin 14 at €788,126.

Dublin 10 remained the postcode with the lowest average house price at €319,549.

Table 4:
Residential Property Transactions and Average House Price by City Council Areas

City authority	Total transactions	% of which new dwellings	Average property price (€)
DUBLIN CITY	5,485	4.0%	€582,644
FINGAL	4,123	34.1%	€514,334
DÚN LAOGHAIRE-RATHDOWN	3,276	23.0%	€772,375
SOUTH DUBLIN	2,966	26.0%	€484,592
CORK CITY	960	5.1%	€393,333
GALWAY CITY	698	11.5%	€410,888
WATERFORD CITY	653	23.3%	€269,066
LIMERICK CITY	555	14.4%	€291,351

Source: CSO. Data is based on residential property transactions data for the 12 months to June 2025. The following options were selected when downloading the data: All Buyer Types, Executions.

Table 5:
Residential Property Transactions and Average House Price by Dublin Postcode

Dublin postcodes	Total transactions	% of which new dwellings	Average property price (€)
D01: DUBLIN 1	221	0.0%	€370,588
D02: DUBLIN 2	202	6.9%	€577,723
D03: DUBLIN 3	552	10.1%	€597,101
D04: DUBLIN 4	666	13.4%	€984,835
D05: DUBLIN 5	410	1.2%	€553,415
D06: DUBLIN 6	435	1.8%	€917,471
D07: DUBLIN 7	503	0.8%	€483,300
D08: DUBLIN 8	533	0.0%	€436,398
D09: DUBLIN 9	563	4.4%	€519,716
D10: DUBLIN 10	133	0.0%	€319,549
D11: DUBLIN 11	435	3.2%	€385,287
D12: DUBLIN 12	534	0.0%	€470,412
D13: DUBLIN 13	707	14.7%	€615,276
D14: DUBLIN 14	539	6.9%	€788,126
D15: DUBLIN 15	1,703	41.6%	€470,934
D16: DUBLIN 16	522	5.9%	€643,103
D17: DUBLIN 17	98	2.0%	€333,673
D18: DUBLIN 18	1,151	37.7%	€694,353
D20: DUBLIN 20	98	1.0%	€452,041
D22: DUBLIN 22	669	46.9%	€410,314
D24: DUBLIN 24	824	11.0%	€407,403
D6W: DUBLIN 6W	260	3.5%	€776,923

Source: CSO. Data is based on residential property transactions data for the 12 months to June 2025. The following options were selected when downloading the data: All Buyer Types, Executions.

Analysis of Transactions and Average Residential Property Prices continued

Total transactions – principal post towns

The top 10 principal post towns accounted for 10,640 residential property transactions in the 12 months to June 2025, equating to 22.2% of the national total.

Aside from the 22 Dublin postcodes, there are 117 principal post towns* located across Ireland (see Appendix).

Based on the principal post town codes, transaction volumes were highest in V94 Limerick (1,549), followed by H91 Galway (1,302) and T12 Cork Southside (1,300).

Among the ten principal post towns with the largest transaction volumes, average property prices were highest in A98 Bray (€578,179), W23 Celbridge (€484,039), and T12 Cork Southside (€446,538) in the 12-month period to June 2025.

Table 6:
Ranking of Principal Post Towns by Total Residential Property Transactions

Principal post towns	Total transactions	% of total number of transactions	Average property price (€)
V94: LIMERICK	1,549	3.2%	€337,573
T12: CORK SOUTHSIDE	1,302	2.7%	€407,220
H91: GALWAY	1,300	2.7%	€446,538
A92: DROGHEDA	1,286	2.7%	€355,054
X91: WATERFORD	1,061	2.2%	€302,168
W91: NAAS	940	2.0%	€442,128
R32: PORTLAOISE	886	1.8%	€282,731
W23: CELBRIDGE	827	1.7%	€484,039
K78: LUCAN	747	1.6%	€578,179
C15: NAVAN	742	1.6%	€361,725

Source: CSO. Data is based on residential property transactions data for the 12 months to June 2025. The average prices are calculated by EY, taking the total value of transactions over the 12 months to June and dividing by the number of transactions. The following options were selected when downloading the data: All Buyer Types, Executions, All Dwelling Statuses.

Total new-build transactions – principal post towns

Focusing specifically on new-build residential property transactions, 10 principal post towns accounted for 31.7% of the national total of new property purchases in the 12 months to June 2025.

Purchasing activity was highest in A92 Drogheda, where 582 new properties were bought in the 12 months to June 2025.

A67 Wicklow (376) and A98 Bray (363) recorded the second and third highest transaction volumes, respectively.

Of the 10 principal post towns with the highest transaction volumes for new properties, average prices were highest in A98 Bray (€616,529), followed by A63 Greystones (€560,727) and T15 Cork Southside (€534,317).

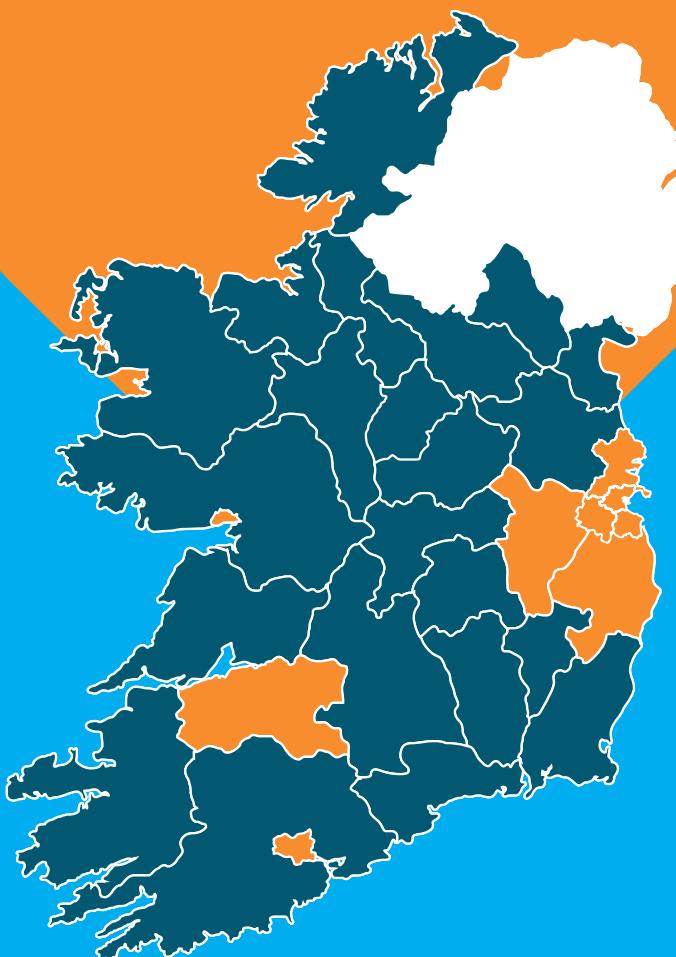
Table 7:
Ranking of Principal Post Towns by Total New Residential Property Transactions

Principal post towns	Total transactions	% of total number of transactions	Average property price (€)
A92: DROGHEDA	582	5.48%	€398,110
K78: LUCAN	376	3.54%	€421,011
A67: WICKLOW	363	3.42%	€616,529
A98: BRAY	334	3.14%	€476,347
W23: CELBRIDGE	330	3.11%	€497,273
A63: GREYSTONES	298	2.81%	€413,758
X91: WATERFORD	275	2.59%	€560,727
V94: LIMERICK	272	2.56%	€377,941
T12: CORK SOUTHSIDE	271	2.55%	€534,317
W91: NAAS	266	2.50%	€477,820

Source: CSO. Data is based on residential property transactions data for the 12 months to June 2025. The average prices are calculated by EY. The following options were selected when downloading the data: All Buyer Types, Executions, New (Dwelling Statuses).

*An Eircode is a seven-character alpha-numeric postcode, unique to a postal address and its geographic location. The CSO provides a detailed geographical breakdown of household market transactions by Eircode Routing Key (the first three alpha-numeric characters of the Eircode), which defines the principal post town delivery area. Each three-character code may capture a number of different towns and villages which fall within the postal delivery area of the principal post town. However, it should be noted that the size of the geographical area encompassed by principal post towns varies significantly. For example, V94 is the area denoted as Limerick which covers 34 different towns and villages across Co. Limerick and Co. Clare, while A67 (Wicklow) includes eight different towns and villages in Co. Wicklow.

National average listed rent increased to €2,023



The average rent in 9 local authority areas is above the average national monthly rent

The average rent in 17 local authority areas is below the average national monthly rent

Average Rent across the Counties

Average market rents saw a YoY increase of 7.3% in Q1 2025 when compared to Q1 2024, while standardised average rents in new tenancies' saw a YoY increase of 5.5% in Q4 2024 when compared to Q4 2023

Daft.ie published their Q1 2025 Rental Price Report** in May 2025, providing more up to date data on market rents. Across the 54 markets covered in the Daft.ie Rental Report, the national average listed rent (€2,023) recorded a 7.3% YoY increase, an increase of €187 compared to Q1 2024.

The gap between rental inflation in Dublin (5.8%) and elsewhere (8.6%) is the smallest it has been in two years. The lowest average rent was observed in Donegal at €1,231 per month.

The Daft.ie Rental Report also reported that Connacht/Ulster had a provincial YoY increase of 6.9%, albeit the second time in four years that the region has seen rental price growth below 10%. Meanwhile Munster experienced a YoY increase of 4.7% in Q1 2025 – in line with the rate of inflation 18 months ago. Leinster (without Dublin) was slightly below the national YoY increase at 5.3%; rents in Q1 2025 were 5.8% higher in Dublin – a more than doubling of inflation since this time last year.

The national standardised average monthly rent in new tenancies, as reported by the RTB, was €1,680 in Q4 2024, which is an increase of €88 compared to Q4 2023.

According to the RTB, within the Dublin local authorities, Dún Laoghaire-Rathdown recorded the highest standardised average rent at €2,195 per month, while Fingal had the lowest (€1,797) in Q4 2024.

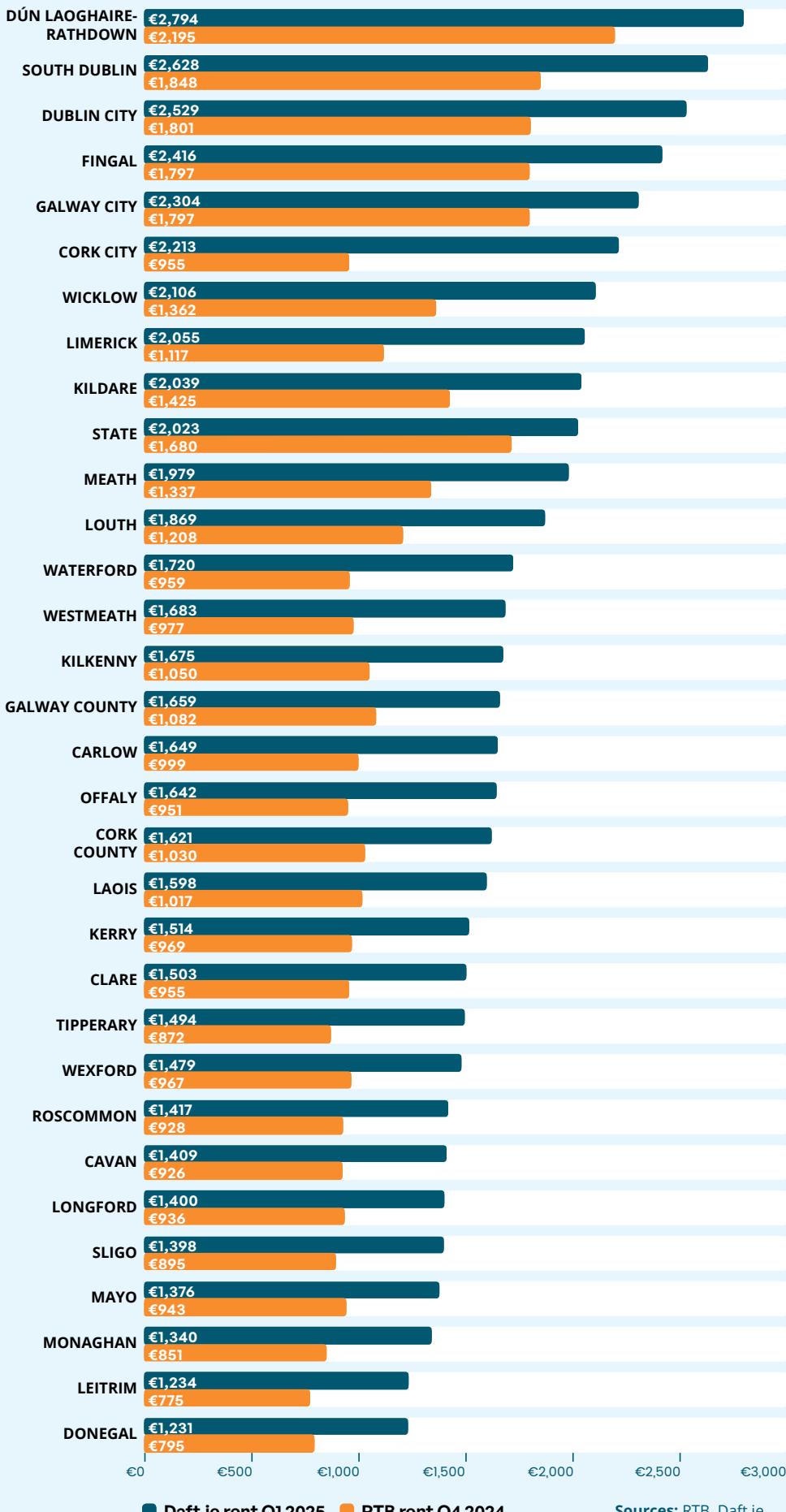
*The term "new tenancies" includes new tenancies in existing rental properties; new tenancies in new rental stock never let before; and new tenancies in properties that have not been let in the immediate two years prior to tenancy.

**Source https://www.daft.ie/report/ronan-lyons-2025q1-daftrentalprice?d_rd=1

Note 1: Figure 9 highlights two different sources for rental figures – Standardised average rents from the RTB's rent index (Q4 2024), and average market rents from the Daft.ie Rental Report (Q1 2025). For the purposes of the affordability section, we will use average market rents from Daft.ie as it includes more up to date rental data.

Note 2: Daft.ie average market rent figures are not reported directly in line with local authority areas used in RTB and CSO data. We have estimated these for the Dublin local authority areas using the breakdown of Dublin found in the Daft.ie report, as well as using the average of city and county rents for Limerick and Waterford. The Dublin areas are estimated as follows: SDCC and DLR use Dublin South rents, Dublin City Council uses an average of North City, South City, and City Centre rents, and for Fingal we use an average of North and West rents.

Figure 9:
Standardised average rents in new tenancies Q4 2024 (RTB) and Average market rents Q1 2025 (Daft.ie)



■ Daft.ie rent Q1 2025 ■ RTB rent Q4 2024

Sources: RTB, Daft.ie

Affordability: First-time buyers – New Dwellings Review

Nationally, it is cheaper to buy than to rent if you are a first-time buyer of a new dwelling in 21 of the 31 local authorities, despite the continued increases in house prices. The average monthly rent across the country in Q1 2025 was €2,023 versus the required monthly mortgage repayment of €1,809, based on a median new house price of €420,000 for the 12 months to June 2025.

The highest median new house price for first-time buyers was in Dublin City (€682,500), followed by Dún Laoghaire Rathdown (€648,630), and Cork City (€475,000)

Six of the seven local authorities that make up the Greater Dublin Area are in the top 10 of the most expensive median new house prices in the country, with Kildare ranked 8th and Meath ranked 11th highest.

Longford had the lowest median new house price for first-time buyers at €319,957 followed by Cavan at €325,000. Longford's median new house price is based off the median house price from August 2024, as that is the most recent data available.

The age-old question – to buy or to rent? Using the median new house price for first time buyers from the CSO, and the latest average rent from Daft.ie, it is possible to calculate the average mortgage payment and compare this to the average rent.

It is currently more affordable to rent rather than purchase a new dwelling for a first-time buyer in just 10 out of the 31 local authorities, as listed in Table 8.

*Median house price is calculated as the median 12-month price from July 2024 to June 2025 for each local authority area.

**Monthly mortgage repayment calculation assumes a 30-year term with a 4.02% mortgage interest rate, using the latest weighted average interest rate for fixed mortgages as reported by the Central Bank of Ireland.

***Calculated for 2025 by applying earnings inflation to 2016 CSO figures on Household Median Gross Income.

Table 8:
Average Market Rents Q1 2025 versus Monthly Mortgage Payments for New Dwellings and Household Income required to Purchase a New Dwelling

Local authority	Median new house price*	90% LTV (assumes 10% deposit)	Monthly mortgage repayments**	Rent as of Q1 2025 (Daft.ie)	HH income required to purchase new dwelling	Median gross HH income
CARLOW	€335,000	€301,500	€1,443	€1,649	€75,375	€57,249
CAVAN	€325,000	€292,500	€1,400	€1,409	€73,125	€55,968
CLARE	€342,499	€308,249	€1,475	€1,503	€77,062	€60,728
CORK CITY	€475,000	€427,500	€2,046	€2,213	€106,875	€56,035
CORK COUNTY	€396,750	€357,075	€1,709	€1,621	€89,269	€71,224
DONEGAL	€335,000	€301,500	€1,443	€1,231	€75,375	€46,427
DUBLIN CITY	€682,500	€614,250	€2,940	€2,529	€153,562	€68,065
DÚN LAOGHAIRE-RATHDOWN	€648,630	€583,767	€2,794	€2,794	€145,942	€95,278
FINGAL	€472,500	€425,250	€2,035	€2,416	€106,313	€84,617
GALWAY CITY	€467,475	€420,728	€2,013	€2,304	€105,182	€64,032
GALWAY COUNTY	€407,462	€366,715	€1,755	€1,659	€91,679	€63,831
KERRY	€425,559	€383,003	€1,833	€1,514	€95,751	€53,738
KILDARE	€451,638	€406,474	€1,945	€2,039	€101,618	€78,395
KILKENNY	€387,500	€348,750	€1,669	€1,675	€87,188	€63,662
LAOIS	€370,621	€333,558	€1,596	€1,598	€83,390	€62,251
LEITRIM	€380,451	€342,405	€1,639	€1,234	€85,601	€50,084
LIMERICK	€397,050	€357,345	€1,710	€2,055	€89,336	€60,192
LONGFORD	€319,957	€287,961	€1,378	€1,400	€71,990	€50,216
LOUTH	€386,238	€347,614	€1,664	€1,869	€86,903	€59,054
MAYO	€359,084	€323,175	€1,547	€1,376	€80,794	€53,558
MEATH	€400,000	€360,000	€1,723	€1,979	€90,000	€75,062
MONAGHAN	€330,000	€297,000	€1,421	€1,340	€74,250	€56,013
OFFALY	€332,975	€299,678	€1,434	€1,642	€74,919	€59,397
ROSCOMMON	€331,496	€298,346	€1,428	€1,417	€74,587	€56,137
SLIGO	€354,000	€318,600	€1,525	€1,398	€79,650	€55,689
SOUTH DUBLIN	€475,000	€427,500	€2,046	€2,628	€106,875	€75,930
TIPPERARY	€339,427	€305,484	€1,462	€1,494	€76,371	€56,921
WATERFORD	€345,540	€310,986	€1,488	€1,720	€77,746	€56,913
WESTMEATH	€373,125	€335,813	€1,607	€1,683	€83,953	€60,924
WEXFORD	€330,000	€297,000	€1,421	€1,479	€74,250	€54,701
WICKLOW	€457,500	€411,750	€1,971	€2,106	€102,938	€69,645
STATE	€420,000	€378,000	€1,809	€2,023	€94,500	€65,132

Sources: Daft.ie CSO and EY analysis

Affordability: First-time buyers – Existing Dwellings

First time buyers looking to purchase an existing dwelling are much better placed from an affordability perspective, with the monthly mortgage repayment on average across the State at €1,471, €552 less than the average monthly rent of €2,023.

The highest median existing house price was in Dún Laoghaire-Rathdown at €607,000, which is €41,630 less than the new house price.

Dublin City (€433,500) and South Dublin (€418,250) follow after Dún Laoghaire Rathdown in terms of high median existing house prices.

The Greater Dublin Area once again sees the highest house prices throughout the State, with all seven of the local authorities that make up the GDA ranking in the top 10 most expensive existing house prices.

Donegal saw the lowest median existing house price at €188,875 in the 12 months to June 2025, followed by Roscommon (€202,000) and Monaghan (€214,500).

As opposed to mortgage repayments for new dwellings, buying was more affordable than renting in all 31 local authorities listed in Table 9. This is due to lower house prices for existing dwellings compared to new dwellings for first-time buyers, with median new house prices 22.9% above the corresponding price for existing dwellings over the period to June 2025.

*Median house price is calculated as the median price from July 2024 to June 2025 for each local authority area.

Table 9:
Average Market Rents Q1 2025 versus Monthly Mortgage Payments for Existing Dwellings and Household Income required to Purchase an Existing Dwelling

Local authority	Median existing house price*	90% LTV (assumes 10% deposit)	Monthly mortgage repayments**	Rent as of Q1 2025 (Daft.ie)	HH income required to purchase an existing dwelling	Median gross HH income
CARLOW	€254,375	€228,938	€1,096	€1,649	€57,234	€57,249
CAVAN	€238,750	€214,875	€1,028	€1,409	€53,719	€55,968
CLARE	€275,875	€248,288	€1,188	€1,503	€62,072	€60,728
CORK CITY	€328,500	€295,650	€1,415	€2,213	€73,913	€56,035
CORK COUNTY	€319,000	€287,100	€1,374	€1,621	€71,775	€71,224
DONEGAL	€188,875	€169,988	€814	€1,231	€42,497	€46,427
DUBLIN CITY	€433,500	€390,150	€1,867	€2,529	€97,538	€68,065
DÚN LAOGHAIRE-RATHDOWN	€607,000	€546,300	€2,614	€2,794	€136,575	€95,278
FINGAL	€397,500	€357,750	€1,712	€2,416	€89,438	€84,617
GALWAY CITY	€358,000	€322,200	€1,542	€2,304	€80,550	€64,032
GALWAY COUNTY	€306,250	€275,625	€1,319	€1,659	€68,906	€63,831
KERRY	€275,250	€247,725	€1,186	€1,514	€61,931	€53,738
KILDARE	€377,500	€339,750	€1,626	€2,039	€84,938	€78,395
KILKENNY	€277,000	€249,300	€1,193	€1,675	€62,325	€63,662
LAOIS	€259,750	€233,775	€1,119	€1,598	€58,444	€62,251
LEITRIM	€230,000	€207,000	€991	€1,234	€51,750	€50,084
LIMERICK	€276,875	€357,345	€1,710	€2,055	€89,336	€60,192
LONGFORD	€224,000	€201,600	€965	€1,400	€50,400	€50,216
LOUTH	€256,250	€230,625	€1,104	€1,869	€57,656	€59,054
MAYO	€231,250	€208,125	€996	€1,376	€52,031	€53,558
MEATH	€338,500	€304,650	€1,458	€1,979	€76,163	€75,062
MONAGHAN	€214,500	€193,050	€924	€1,340	€48,263	€56,013
OFFALY	€255,250	€229,725	€1,099	€1,642	€57,431	€59,397
ROSCOMMON	€202,000	€181,800	€870	€1,417	€45,450	€56,137
SLIGO	€233,000	€209,700	€1,004	€1,398	€52,425	€55,689
SOUTH DUBLIN	€418,250	€376,425	€1,801	€2,628	€94,106	€75,930
TIPPERARY	€247,250	€222,525	€1,065	€1,494	€55,631	€56,921
WATERFORD	€252,625	€310,986	€1,488	€1,720	€77,746	€56,913
WESTMEATH	€275,000	€247,500	€1,184	€1,683	€61,875	€60,924
WEXFORD	€246,250	€221,625	€1,061	€1,479	€55,406	€54,701
WICKLOW	€374,500	€337,050	€1,613	€2,106	€84,263	€69,645
STATE	€340,000	€306,000	€1,464	€2,023	€76,500	€65,132

Sources: Daft.ie, CSO and EY analysis

Affordability: Income Analysis

Household income also plays a vital role when determining affordability for first-time buyers.

Comparing the household income required to purchase a home versus the actual median gross household income in each local authority area further proves that existing dwellings are considered more affordable than new dwellings.

The State median household income as of Q1 2025 was €65,132. For both new and existing dwellings, €65,132 is insufficient to afford the State median new or existing house price, based on requiring a 90% Loan-to-Value ratio.

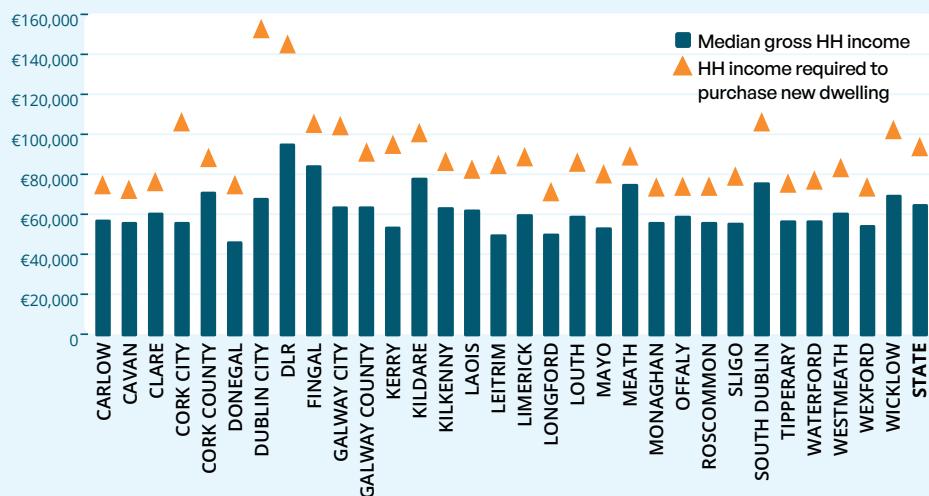
Median household income in Dún Laoghaire Rathdown as of Q1 2025 was €95,278 the highest median household income in the country. However, households in Dún Laoghaire-Rathdown face an income gap, requiring an additional €50,663 in household annual income to purchase a new dwelling.

Looking at new house prices only, the household income required to purchase a new dwelling is higher than the median household income for all the 31 local authorities listed in Figure 10. Dublin City faces the highest income gap at €85,498.

On the other hand, existing house prices tell a slightly more positive story. Households in 12 local authorities are currently able to afford an existing dwelling based on current median gross household income. Households in Roscommon and Monaghan are in the greatest position to purchase an existing dwelling, having €10,687 and €7,751 more than the income required, respectively.

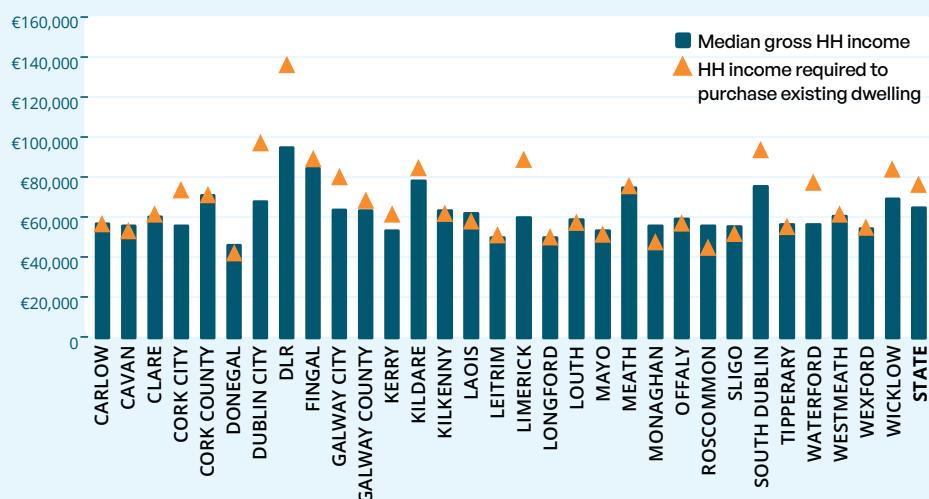
Figure 12 shows average market rents in Q1 2025 against monthly mortgage repayments for both new and existing dwellings. This highlights that in just 10 of the 31 local authorities, it is cheaper to rent a new dwelling than it is to buy. Moreover, it is cheaper to purchase an existing dwelling than it is to rent in all 31 local authorities.

Figure 10:
Median Household Income Gap for New Dwellings



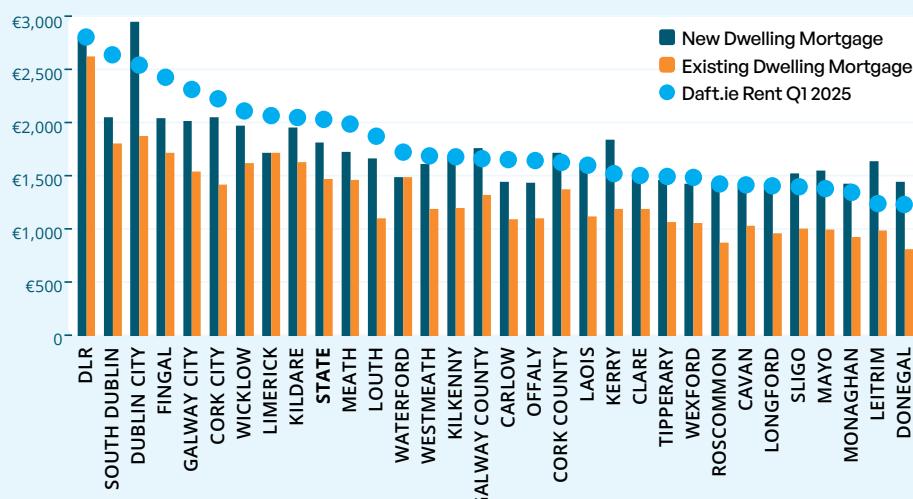
Sources: CSO and EY analysis

Figure 11:
Median Household Income Gap for Existing Dwellings



Source: CSO and EY analysis

Figure 12:
New/Existing Mortgage Repayments against Average Market Rents



Source: CSO, Daft.ie and EY analysis

Appendix

The following Table provides data on residential property transactions, based on Eircode. The Eircodes are based on the areas for which An Post town sorting centres have responsibility.

Table 10:
Residential Property Transactions and Average House Price by Eircode Area

Area	Total transactions	% of which new	Average price
A41: Ballyboughal	4	0.0%	€600,000
A42: Garristown	22	54.5%	€522,727
A45: Oldtown	7	0.0%	€585,714
A63: Greystones	621	44.3%	€584,863
A67: Wicklow	650	57.8%	€427,077
A75: Castleblaney	75	6.7%	€232,000
A81: Carrickmacross	80	13.8%	€272,500
A82: Kells	397	12.8%	€294,962
A83: Enfield	116	37.1%	€389,655
A84: Ashbourne	173	19.7%	€400,000
A85: Dunshaughlin	313	52.7%	€471,565
A86: Dunboyne	83	14.5%	€495,181
A91: Dundalk	691	31.3%	€324,023
A92: Drogheda	1,286	45.3%	€355,054
A94: Blackrock	614	8.8%	€907,818
A96: Glenageary	663	9.5%	€859,276
A98: Bray	747	48.6%	€578,179
C15: Navan	742	25.7%	€361,725
E21: Cahir	66	3.0%	€239,394
E25: Cashel	100	22.0%	€270,000
E32: Carrick-on-Suir	86	0.0%	€238,372
E34: Tipperary	125	10.4%	€212,800
E41: Thurles	221	2.3%	€238,914
E45: Nenagh	182	15.4%	€280,220
E53: Roscrea	78	2.6%	€206,410
E91: Clonmel	219	6.8%	€269,406
F12: Claremorris	259	2.7%	€219,691
F23: Castlebar	218	12.8%	€271,560
F26: Ballina	308	5.5%	€209,416
F28: Westport	194	11.9%	€310,825
F31: Ballinrobe	52	3.8%	€205,769
F35: Ballyhaunis	86	0.0%	€166,279
F42: Roscommon	176	9.7%	€234,091
F45: Castlerea	215	1.4%	€162,791
F52: Boyle	95	6.3%	€196,842
F56: Ballymote	66	4.5%	€193,939
F91: Sligo	568	14.1%	€273,592
F92: Letterkenny	436	14.0%	€234,174
F93: Lifford	334	2.7%	€189,521
F94: Donegal	358	12.0%	€227,374
H12: Cavan	245	9.0%	€245,306
H14: Belturbet	72	2.8%	€191,667
H16: Cootehill	31	0.0%	€180,645
H18: Monaghan	130	7.7%	€228,462
H23: Clones	31	0.0%	€193,548
H53: Ballinasloe	206	2.9%	€227,184
H54: Tuam	172	2.3%	€262,791
H62: Loughrea	103	7.8%	€323,301
H65: Athenry	89	36.0%	€352,809
H71: Clifden	34	0.0%	€358,824
H91: Galway	1,302	18.0%	€407,220
K32: Balbriggan	339	28.6%	€356,342
K34: Skerries	129	15.5%	€565,891
K36: Malahide	629	41.0%	€688,076
K45: Lusk	133	48.1%	€431,579
K56: Rush	182	59.3%	€431,319
K67: Swords	530	14.3%	€438,302
K78: Lucan	729	45.3%	€473,937
N37: Athlone	407	20.1%	€300,000
N39: Longford	328	0.9%	€215,244
N41: Carrick-on-Shannon	275	7.6%	€216,727

Smarter Data for Better Results

2,170,000+
Residential Addresses

210,000+
Commercial Addresses



Connect today
www.geodirectory.ie

Table 10:
Residential Property Transactions and Average House Price by Eircode Area continued

Area	Total transactions	% of which new	Average price
N91: Mullingar	520	13.8%	€310,577
P12: Macroom	139	46.0%	€362,590
P14: Crookstown	50	72.0%	€402,000
P17: Kinsale	179	36.9%	€510,056
P24: Cobh	144	25.7%	€325,694
P25: Midleton	451	43.7%	€371,840
P31: Ballincollig	298	45.3%	€444,966
P32: Rylane	20	0.0%	€310,000
P36: Youghal	144	13.9%	€277,083
P43: Carrigaline	297	40.1%	€424,579
P47: Dunmanway	67	1.5%	€271,642
P51: Mallow	527	16.9%	€262,429
P56: Charleville	71	0.0%	€204,225
P61: Fermoy	187	47.6%	€327,807
P67: Mitchelstown	52	0.0%	€257,692
P72: Bandon	182	48.9%	€374,176
P75: Bantry	111	13.5%	€271,171
P81: Skibbereen	140	4.3%	€385,714
P85: Clonakilty	141	46.1%	€393,617
R14: Athy	186	11.8%	€291,935
R21: Mhuine Bheag	37	0.0%	€229,730
R32: Portlaoise	886	27.3%	€282,731
R35: Tullamore	303	9.9%	€285,149
R42: Birr	145	2.8%	€219,310
R45: Edenderry	125	32.8%	€293,600
R51: Kildare	206	54.9%	€382,524
R56: Curragh	103	18.4%	€385,437
R93: Carlow	487	22.2%	€286,448
R95: Kilkenny	697	31.0%	€348,494
T12: Cork Southside	1,300	20.8%	€446,538
T23: Cork Northside	589	21.1%	€343,803
T34: Carrignavar	21	57.1%	€395,238
T45: Glanmire	325	42.2%	€387,692
T56: Watergrasshill	32	25.0%	€384,375
V14: Shannon	93	22.6%	€273,118
V15: Kilrush	125	1.6%	€233,600
V23: Caherciveen	69	2.9%	€275,362
V31: Listowel	109	1.8%	€247,706
V35: Kilmallock	170	31.2%	€287,647
V42: Newcastle West	119	16.8%	€246,218
V92: Tralee	426	4.5%	€287,559
V93: Killarney	400	8.3%	€339,750
V94: Limerick	1,549	19.2%	€337,573
V95: Ennis	563	11.5%	€313,854
W12: Newbridge	447	50.6%	€412,081
W23: Celbridge	827	40.4%	€484,039
W34: Monasterevin	76	35.5%	€342,105
W91: Naas	940	28.3%	€442,128
X35: Dungarvan	137	2.2%	€343,796
X42: Kilmacthomas	35	0.0%	€300,000
X91: Waterford	1,061	25.6%	€302,168
Y14: Arklow	240	0.8%	€309,583
Y21: Enniscorthy	399	16.8%	€285,965
Y25: Gorey	475	23.6%	€340,421
Y34: New Ross	222	1.4%	€218,468
Y35: Wexford	703	26.5%	€306,970

Source: CSO based on residential property transactions data for the 12 months to June 2025. The following options were selected when downloading the data: All Buyer Types, Executions.

About this report

This report presents data on the residential building stock using the GeoDirectory database of residential address points. Other official data is presented for comparison from the CSO and the Department of Housing, Local Government and Heritage.

The GeoDirectory database distinguishes between a 'dwelling' which is a single residential unit as opposed to a 'building' which can comprise one or more dwellings. This report will predominantly focus on individual 'dwellings'.

The GeoDirectory dataset contains a range of variables on residential dwellings, including the following:

- > Address Point for each dwelling and building type.
- > Dwellings by Building Type (Detached, Semi-Detached, Terraced, Duplexes, Bungalows, Temporary); there is no separate classification for apartments, but GeoDirectory defines an apartment as a dwelling which exists in a building of 5 or more dwellings.
- > Buildings Under Construction.
- > Address points (dwellings) by Town and County.

This report provides an up-to-date national assessment of the stock of residential buildings in the State.

GeoDirectory

GeoDirectory was established to create and manage Ireland's only complete database of commercial and residential buildings.

Each of the over 2.1 million residential building records contained in GeoDirectory includes:

- > An accurate standardised postal address
- > Details for each building type (commercial or residential)
- > A unique 8-digit identity number or fingerprint
- > x, y coordinates which accurately locate the centre point of each building to within one metre on the National Grid.

The GeoDirectory database is used by many different companies and organisations across a diverse range of applications, including the emergency services, utility companies, banking and insurance providers, and all local authorities.

EY Economic Advisory

This report is prepared by EY Economic Advisory.

EY Economic Advisory provides a full suite of economic services in the Irish market, helping both public and private sector clients understand the current and future environments they operate in, and allowing vitally important scenario planning and decision-making.

EY Economic Advisory combines vast experience in the market as an essential source of sectoral understanding, offering services such as economic forecasting, economic impact analysis, cost benefit analysis and sector specific economic analysis.

Connect to GeoDirectory for data and facts