



RTB

Bord um Thionóntachtaí Cónaithe
Residential Tenancies Board

RTB Director's Quarterly Update

September 2026



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Introduction



Rosemary Steen
Director, RTB

As the regulator of Ireland's rental sector, the Residential Tenancies Board plays a vital role in Irish society. Our quarterly Director's updates are the definitive source of data on Ireland's rental sector. They help landlords, tenants and policy makers to understand current trends in Ireland's rental market.

Unlike commercial reports, the RTB's quarterly updates draw on the national register of tenancies. This enables us to provide the most complete and authoritative view of Ireland's rental sector.

What is included in this update?

This update includes two data sets that draw on the national register of tenancies:

- **Profile of the Register Data Series for Q2 2026:** This tells us about the size of Ireland's rental sector.
- **RTB / ESRI Rent Index for Q1 2026:** The most accurate picture of average rents paid for new and existing private tenancies in Ireland, regardless of how they are advertised.

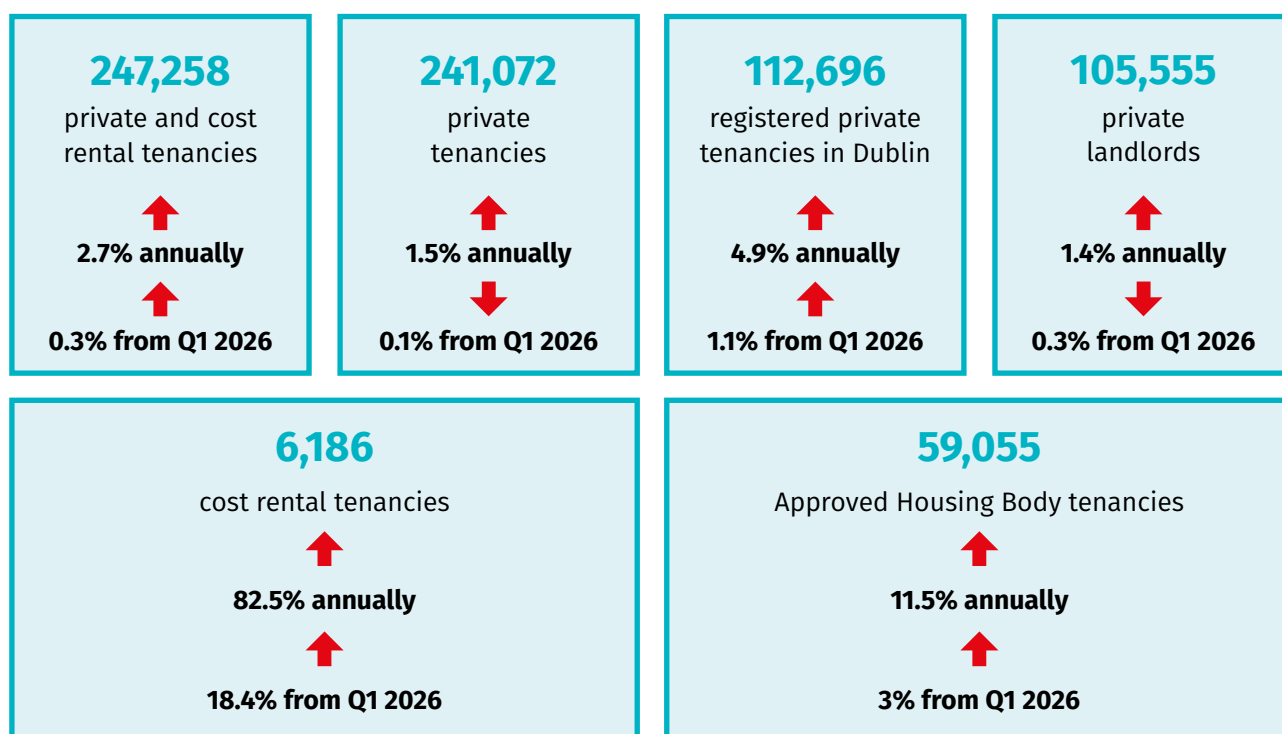
This update also includes RTB administrative data sets for Q2 2026 that can signal emerging trends in the rental market:

- **Notice of Termination data for Q2 2026.** This tells us how many landlords are ending tenancies and why.
- **Dispute resolution applications in Q2 2026.** This tells us who applied for formal tenancy dispute resolution and why.
- **RTB Compliance and Enforcement updates for Q2 2026.** This reflects RTB priority actions to uphold rental law.

Rental Sector Overview

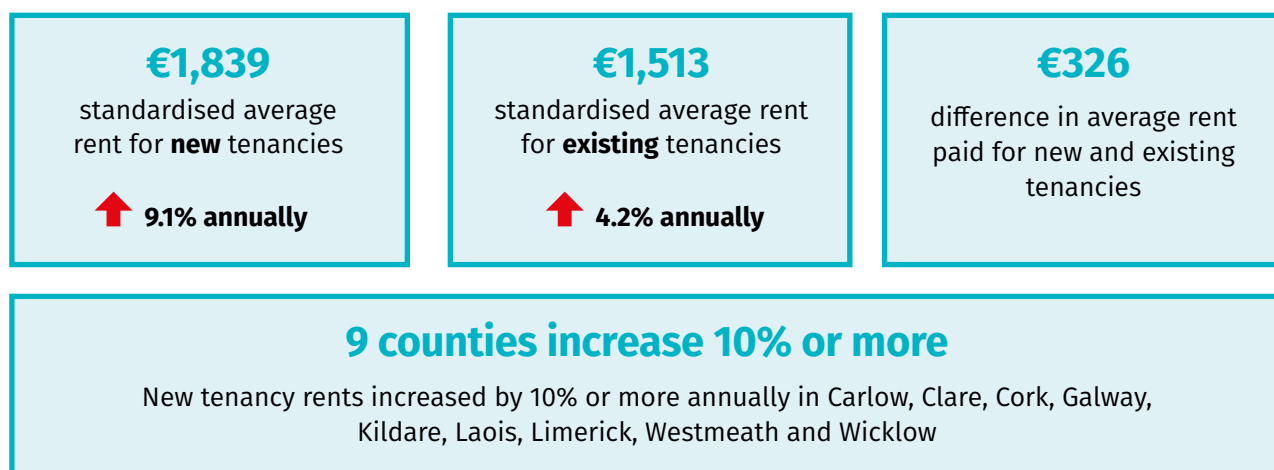
Profile of the Register data series to Q2 2026: Total registered tenancies increased in Q2 2026 driven by strong growth in cost rental and Approved Housing Body tenancies.

Total registered tenancies across private, cost rental and Approved Housing Bodies increased by 4.3% annually and 0.8% from Q1 to 306,313. This was driven by strong growth in cost rental and AHB tenancies while private tenancies were largely static from Q1.

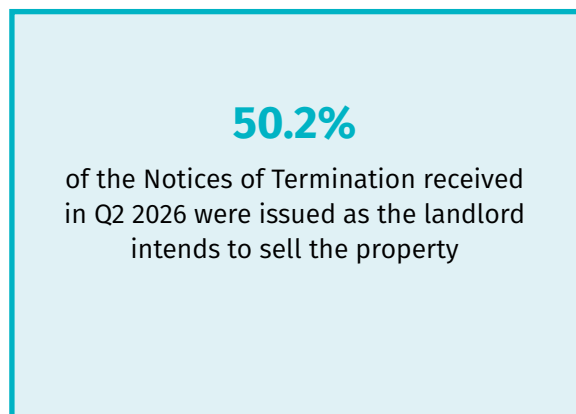
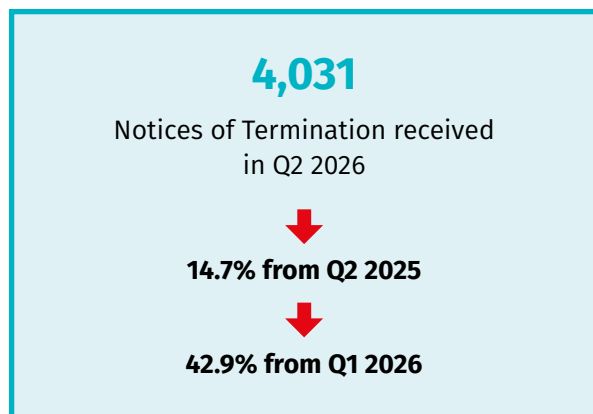


RTB / ESRI Quarterly Rent Index Q1 2026: Rate of rental inflation for new tenancies increased but rate of price growth remained lower for existing tenancies.

Nationally, average rents rose for new and existing tenancies. The rate of growth was higher for new tenancies but remained stable and consistent with previous quarters for existing tenancies. Highest new tenancy rent increases were observed in counties Limerick, Clare, Cork and Westmeath.

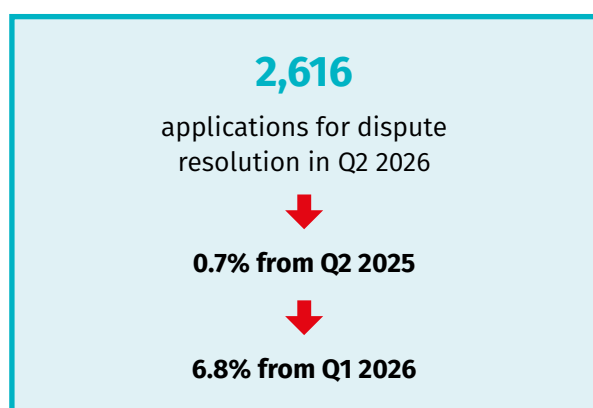


RTB Notice of Termination data: Notices of Termination decrease sharply in Q2.



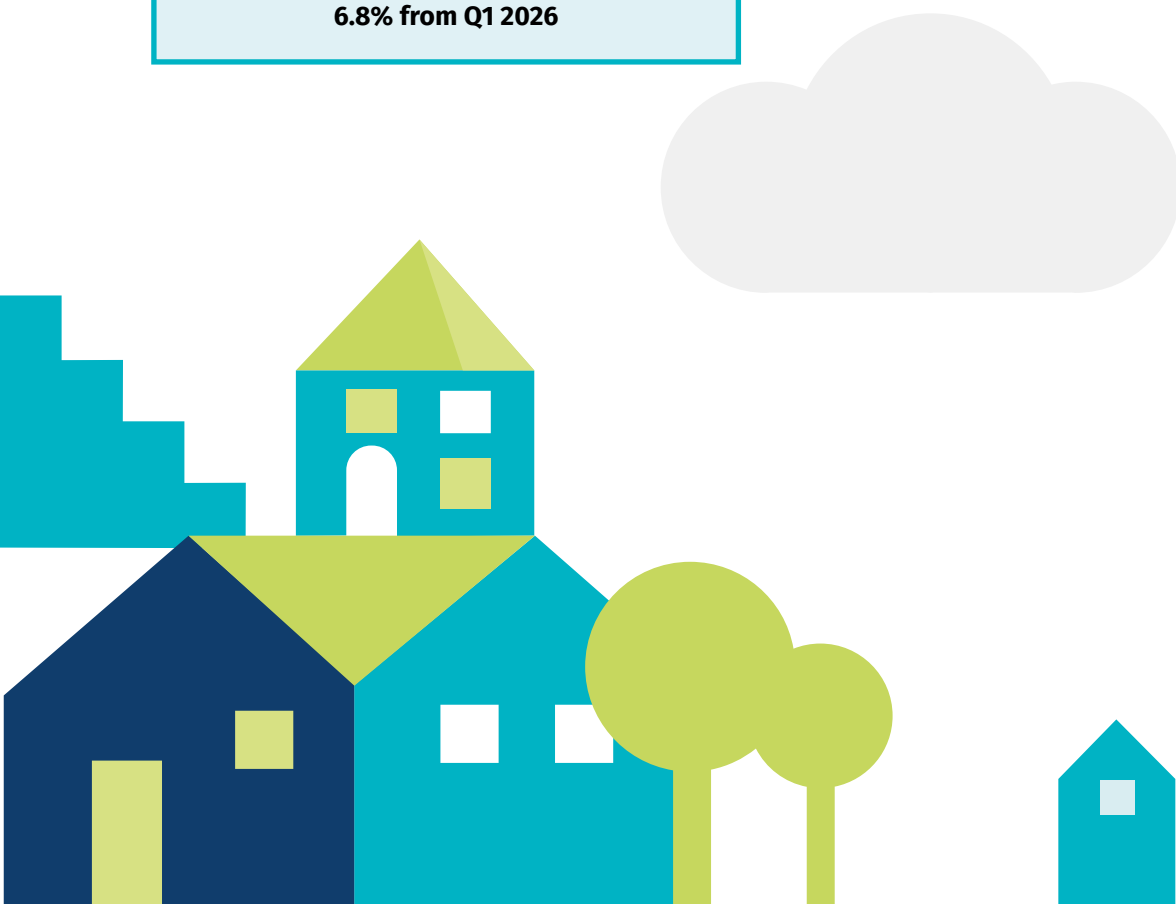
RTB Dispute Resolution Service data: Dispute applications decrease in Q2 2026.

The level of dispute applications dropped slightly to 2,616 in Q2 2026 compared with the same quarter a year earlier.



Top three dispute reasons

- Rent arrears /rent arrears and overholding
- Overholding
- Breach of landlord obligations



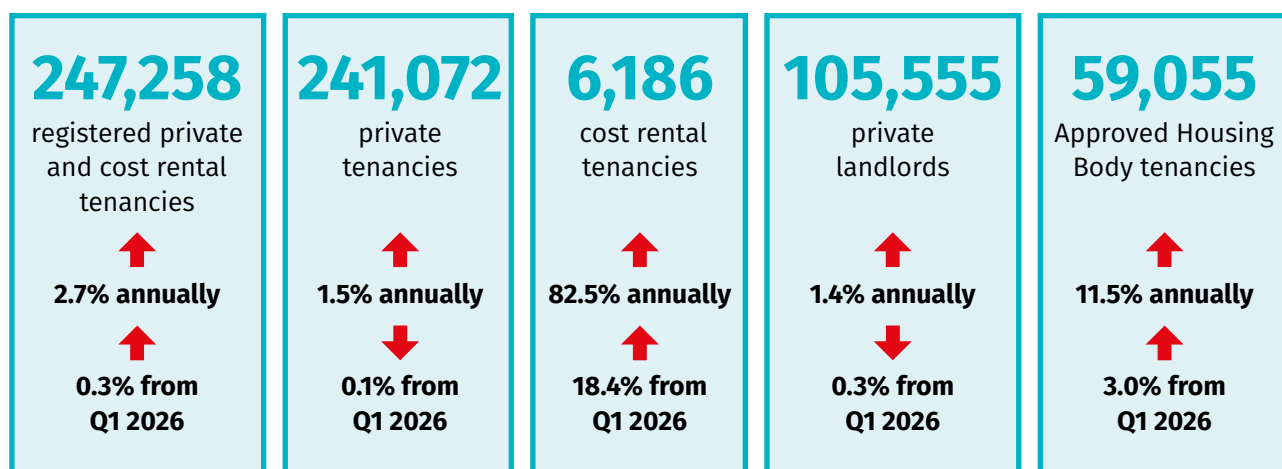
Data in Detail

Profile of the Register Q2 2026

The Residential Tenancies Board 'Profile of the Register' data series is the most authoritative and complete source of information on the size and profile of Ireland's rental sector.

The series tracks the number of private, cost rental and Approved Housing Body (AHB) tenancies registered with the RTB at the end of each quarter from Q2 2023. The data can be broken down by county, Local Authority, Local Electoral Area, dwelling type, dwelling size and landlord size.

The key findings from the RTB Profile of the Register data to the end of Q2 2026 are:



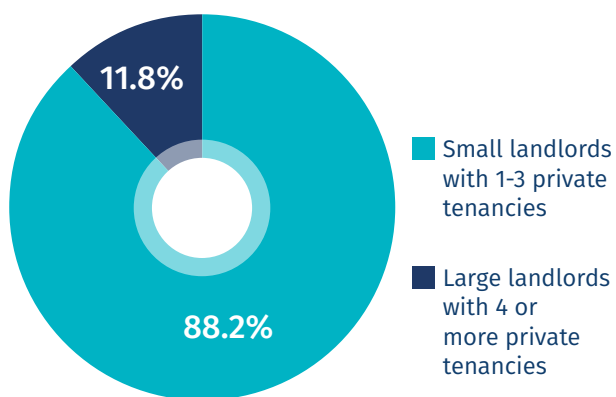
Private and Cost Rental Tenancies – Key Data

- The number of private and cost rental tenancies registered with the RTB grew year-on-year.
- Registered private and cost rental tenancies stood at 247,258 at the end of Q2 2026. This is an increase of 2.7% annually and 0.3% quarter-on-quarter.
- County breakdowns show the highest number of private and cost rental tenancies at the end of Q2 2026 were recorded in:
 - Dublin (112,696)
 - Cork (25,336)
 - Galway (13,196)
- Lowest numbers of tenancies were recorded in:
 - Leitrim (1,116)
 - Longford (1,888)
 - Monaghan (2,119)
- In Q2 2026, 54% of private and cost rental registered tenancies were in apartments, while 46% were in houses.
- 2- and 3-bedroom properties are the most common dwelling sizes, accounting for two-thirds of private and cost rental tenancies registered in Q2 2026.

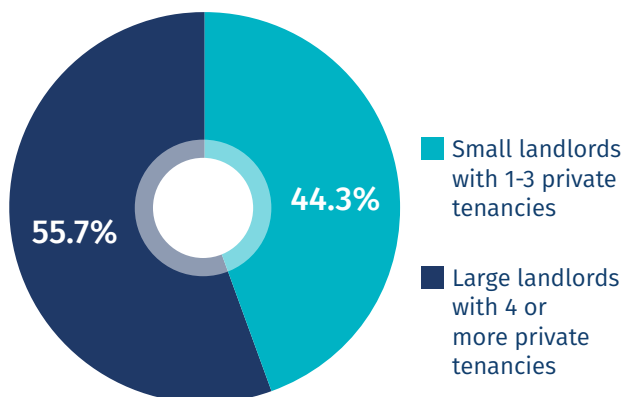
Private Landlords - Key Data

- The number of landlords associated with registered private tenancies was 105,555 at the end of Q2 2026. This is an increase of 1.4% annually but a decrease of 0.3% or 292 landlords quarter-on-quarter.
- At the end of Q2 2026, landlords with one tenancy accounted for 66.1% of all private landlords. The proportion of tenancies provided by landlords with one tenancy was 24.6% in Q2 2026.
- The shape of the private rental sector continued to evolve in Q2 2026. The proportion of tenancies provided by landlords with 100+ tenancies increased for the 13th consecutive quarter to stand at 15.6%, the highest since the series began in Q2 2023.
- In Dublin, landlords with 100+ tenancies accounted for 29.8% of all private tenancies registered at the end of Q2 2026. Outside Dublin, landlords with 100+ tenancies accounted for 3.9%.

Landlords by size in Q2 2026



Proportion of private tenancies provided by landlord size in Q2 2026



Landlords by the number of private tenancies they have on RTB Register Q4 2024 - Q2 2026

	Q4 2024	Q1 2025	Q2 2025	Q3 2025	Q4 2025	Q1 2026	Q2 2026
Landlords with 1 tenancy	70,040	69036	68,814	68,659	69,291	70,077	69,801
Landlords with 2 to 5 tenancies	28,842	28730	28,568	28,476	28,734	29,026	29,049
Landlords with 6 to 10 tenancies	4,219	4199	4,180	4,159	4,150	4,218	4,182
Landlords with 11 to 20 tenancies	1,601	1597	1,605	1,596	1,627	1,636	1,638
Landlords with 21 to 50 tenancies	647	662	653	627	617	614	609
Landlords with 51 to 99 tenancies	125	125	130	134	139	140	139
Landlords with 100+ tenancies	120	121	122	123	129	136	137
Total number of landlords	105,594	104,470	104,072	103,774	104,687	105,847	105,555

Approved Housing Body (AHB) Tenancies - Key Data

- AHB tenancies registered with the RTB have increased every quarter since the series began in Q2 2023.
- AHB registered tenancies rose to 59,055 at the end of Q2 2026, an increase of 1,725 tenancies or by 3% from Q1 2026.
- In Q2 2026, 51.8% of AHB registered tenancies were in apartments, while 48.2% were in houses.
- 2- and 3-bedroom properties are the most common dwelling sizes, accounting for 71.8% of AHB tenancies on the register at the end Q2 2026.
- County breakdowns show the highest number of AHB tenancies in Q2 2026 were recorded in:
 - Dublin (21,966)
 - Cork (6,379)
 - Kildare (3,089)
 - Louth (2,962)
 - Meath (2,393)
- Lowest numbers of AHB tenancies were recorded in:
 - Leitrim (129)
 - Longford (323)
 - Roscommon (208)

Notes:

The 'Profile of the Register' provides more accurate and in-depth information than previously available on the Irish rental sector. This follows improvements made to the RTB's registration processes between Q4 2021 and Q2 2023. The changes made to remove duplicate and inactive tenancies include:

- A new requirement to renew tenancies annually.
- Automatic removal of tenancies which are not renewed from the Register.
- Eircode validation for all tenancy addresses.
- Landlords verified by PPSN or CRO number.

The system improvements and enhanced validation processes mean that this new data series is not directly comparable to tenancy figures published for periods prior to Q2 2023.

RTB/ESRI Rent Index Q1 2026

The quarterly RTB/ESRI Rent Index tracks price developments in the Irish rental market over time. It is based on RTB tenancy registration data that is independently analysed by the Economic and Social Research Institute (ESRI).

The RTB/ESRI Rent Index provides the most accurate picture of the average rents for new and existing private tenancies in Ireland. Unlike other market monitoring reports, the index is based on regulatory data that can track rent paid for all new registered tenancies, regardless of how they were advertised. The index is also unique in its ability to track trends in rent paid for all existing tenancies registered with the RTB in each quarter.

The index compares a sample of all tenancies registered in one quarter with those registered in the previous quarter and the same quarter one year previously. The report provides a standardised average rent which controls for differences in the property characteristics that make up the sample in each quarter.

Key Trends

- Nationally, average rents continue to increase for new and existing tenancies. New tenancy rents rose by 9.1% annually while existing tenancy rents increased by 4.2% annually.
- New tenancy rents increased by 7.8% in Dublin compared with 8.9% outside Dublin.
- Sitting tenants continue to pay lower rents than new tenants. The standardised average rent paid by new tenants nationally is now €1,839 per month. For existing tenants, it is €1,513 per month. This is a difference of €326 per month or 21.6%.
- New tenancy rents increased by 10% or more annually in nine counties. These were: Carlow, Clare, Cork, Galway, Kildare, Laois, Limerick, Westmeath and Wicklow.
- For existing tenancies, standardised average rents increased by less than 5% in 14 counties.

New Tenancies Rent Index – Q1 2026 Key Data

- The standardised average rent for new tenancies grew by 9.1% nationally year-on-year.
- €1,839 was the standardised average rent for **new** tenancies.
- By county, it was highest in Dublin at €2,335 per month and lowest in Leitrim at €1,040 per month.
- The highest annual growth rate in average rent for new tenancies was seen in:
 - Clare (19.1%)
 - Limerick (16.3%)
 - Westmeath (13.7%)
- The lowest annual growth rates in average rent for new tenancies was seen in:
 - Leitrim (-3.1%)
 - Wexford (3.7%)
 - Donegal (3.9%)
- Looking at cities, Dublin City had the highest average rent for new tenancies at €2,301, followed by Galway City at €2,004, Limerick City at €1,921 and Cork City at €1,903.

€1,839

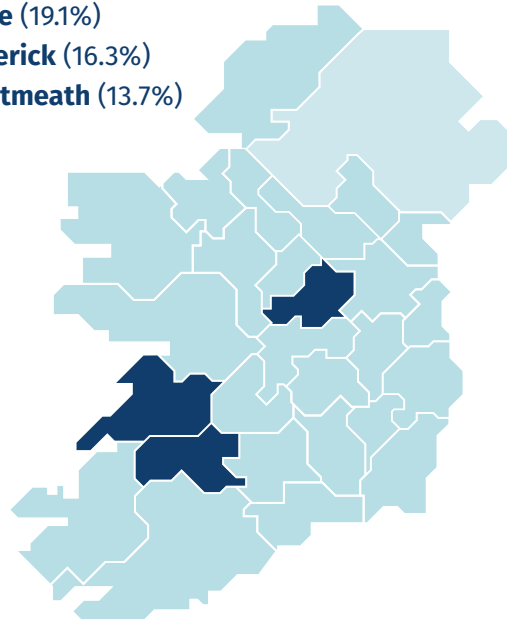
standardised average rent
for new tenancies



9.1% annually

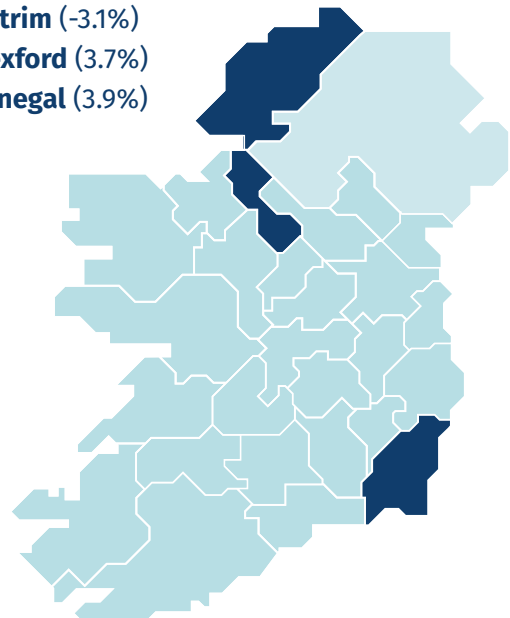
The highest growth rates in average rents for new tenancies

Clare (19.1%)
Limerick (16.3%)
Westmeath (13.7%)



The lowest growth rates in average rents for new tenancies

Leitrim (-3.1%)
Wexford (3.7%)
Donegal (3.9%)



Existing Tenancies Rent Index – Q1 2026 Key Data

- The standardised average rent for existing tenancies grew by 4.2% nationally year-on-year.
- €1,512 was the standardised average rent for **existing** tenancies.
- By county, it was highest in Dublin at €1,960 per month and lowest in Donegal at €872 per month.
- 29.8% of existing tenancies in Q1 2026 were new tenancies one year earlier. In addition to new tenancies in existing rental properties, new tenancies also include new builds and properties not rented for two years that were not subject to Rent Pressure Zone rules and national rent control rules in effect in Q1 2026. They tend to come on the market at a higher rent. When they move to the Existing Tenancies Rent Index, they push up the average rent level on this index.
- The highest growth rates in average rents for existing tenancies were seen in:
 - Leitrim (8.7%)
 - Donegal (8.3%)
 - Kerry (6.7%)
- The lowest growth rates in average rents for existing tenancies were seen in:
 - Westmeath (2.3%)
 - Galway (3.3%)
 - Wicklow (3.5%)
- Looking at cities, the standardised average rent for existing tenancies in Q1 2026 was highest in Dublin City at €1,901. This was followed by Galway City at €1,445, Cork City at €1,422 and Limerick City at €1,261.

€1,513

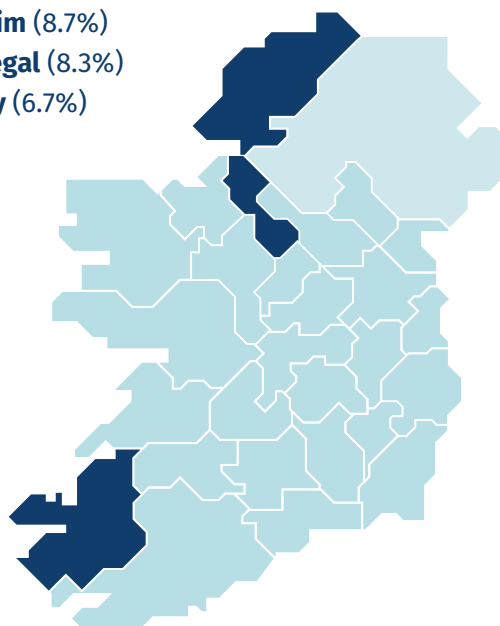
standardised average rent
for existing tenancies



4.2% annually

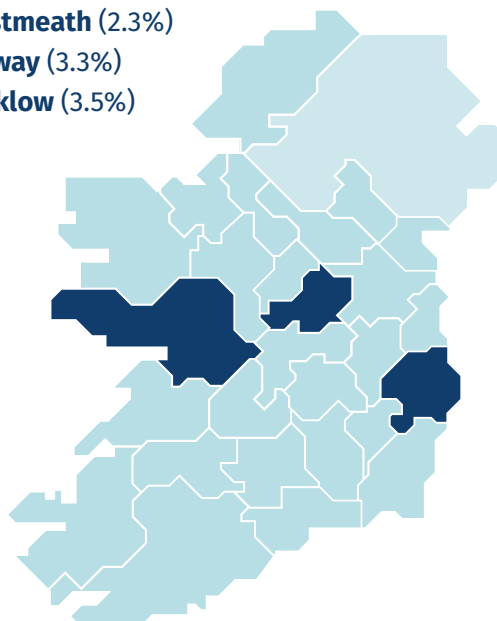
The highest growth rates in average rents for existing tenancies

Leitrim (8.7%)
Donegal (8.3%)
Kerry (6.7%)



The lowest growth rates in average rents for existing tenancies

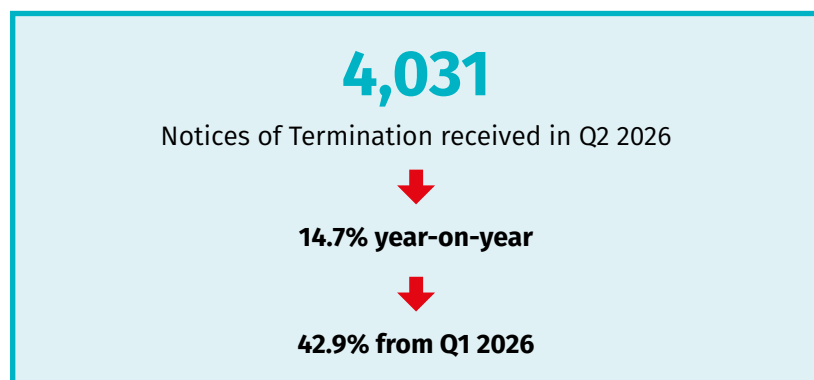
Westmeath (2.3%)
Galway (3.3%)
Wicklow (3.5%)



Notices of Termination Q2 2026

When a landlord wants to end a tenancy, they share a document called a Notice of Termination (NoT) with their tenant. The Notice of Termination states the reason for ending the tenancy. It must be served on the RTB on the same day it is served served to the tenant. This data can help us to understand why landlords are ending tenancies, and if landlords are selling to exit the market.

Notices of Termination received in Q2 2026



Top reasons for ending a tenancy in Q2 2026

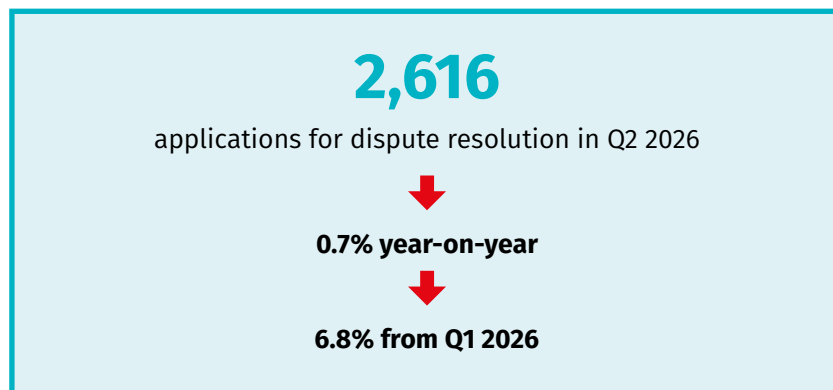
Reasons	Number	Percentage
Landlord intends to sell the property	2,023	50.2%
Breach of tenant obligations	782	19.4%
Landlord/landlord's family member intends on moving into the property	725	18%



RTB Dispute Resolution Service Data

The level of dispute applications received by the RTB in Q2 2026 decreased by 0.7% compared with the same quarter a year earlier. The top reasons for submitting a dispute remain consistent over consecutive quarters.

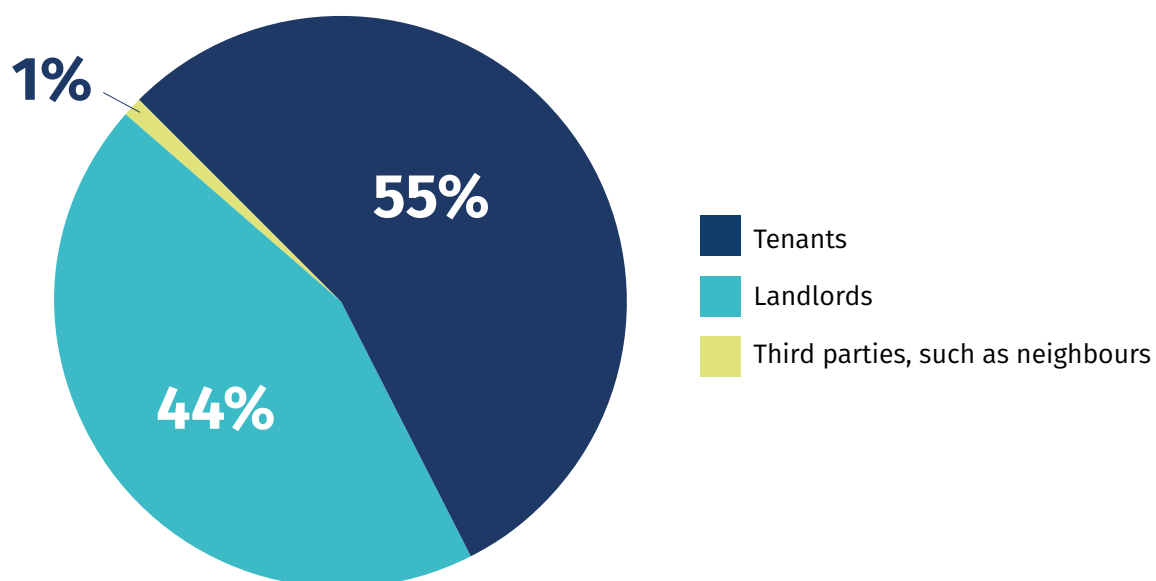
Dispute applications in Q2 2026



Top reasons for dispute applications in Q2 2026

Reasons	Percentage
Rent arrears /rent arrears and overholding	31%
Overholding	23%
Breach of landlord obligations	19%

Dispute applicants in Q2 2026



RTB Compliance and Enforcement Activity Q2 2026

Pursuing serious offenders

In Q2 2026, the RTB's Compliance and Enforcement team continued to focus significant resources on in-depth investigations into serious, deliberate and repeated breaches of rental law by a small number of landlords. At the end of Q2 2026, the RTB had approved 64 new investigations into breaches of rental law to date this year.

Investigations into serious offenders are resource intensive and can take up to 12 months to secure court confirmation of sanctions. The baseline time to complete an investigation reflects the investigation stages and mandatory wait periods prescribed by the Residential Tenancies Act. The full time to complete an investigation is also influenced by the complexity of a case, landlord engagement and court waiting lists in different regions.

The RTB issued 81 decisions on investigation cases to the end of Q2 2026. However, the RTB continues to experience delays in the final stages of securing court confirmation for these decisions. The RTB had 97 cases awaiting court confirmation of sanctions imposed by RTB decision makers at the end of Q2 2026. The RTB cannot publish investigation outcomes until the decision is confirmed by the Circuit Court and all appeal periods have passed. The RTB published 19 sanctions against landlords to the end of Q2 2026 with a total value of €78,850.

Ensuring compliance and delivering results for tenants

Alongside using our investigation and sanction process to pursue the most serious cases, the RTB has focused on compliance interventions that deliver faster compliance and results for tenants.

Registration enforcement – criminal process

- The RTB issued 1,133 compliance notices for failure to register in Q2 2026.
- 18 court summonses were served in Q2 2026, and court enforcement processes remain ongoing in 16 cases.

Early compliance intervention

- €55,625 in overpaid rent has been returned to tenants through initial compliance interventions in Q1 and Q2 2026.





For more information, visit **rtb.ie**