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WEEKLY ENERGY REPORT

03 / 2025

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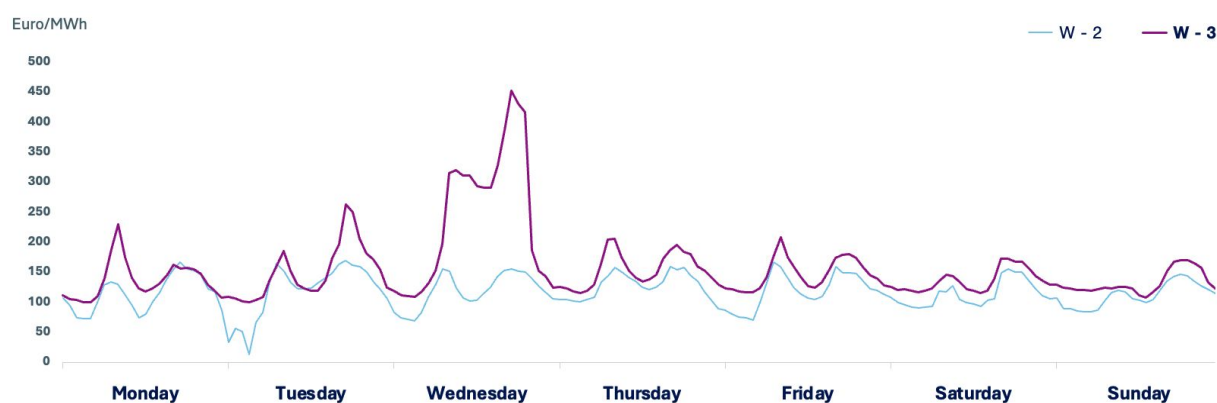
Day Ahead Market Price

DAM PRICES	CET Hours		
	Week 2 [Euro/MWh]	Week 3 [Euro/MWh]	Variation %
Average Price	117,64	157,06	33,5%
Maximum Price	170,00	452,13	166,0%
Minimum Price	13,13	100,00	661,6%
$\Delta\text{Price} = \max(\text{average}) - \min(\text{average})$	83,97	114,91	36,9%

In the past week, Romania's energy prices saw a notable increase of 34%, reaching **€157,06/MWh**, positioning the country at the forefront of the coupled market rankings. This trend was observed both on a weekly and hourly basis.

The highest recorded hourly price of the week was **€452,13/MWh**, marking a significant **166% rise** from the previous week. Additionally, the minimum price for the week settled at **€100/MWh** - still an extraordinary 661,6% increase compared to the prior week.

Hourly Prices



On Wednesday, January 15th, Romania's energy consumption reached a two-year high, surpassing 8,800 MWh/h. This rise pushed spot prices up to €452,13/MWh, which not only made Romania the leader for the highest price in Europe that week, but also saw Bulgaria and Greece hitting the same level.

It's worth noting that more than half of the European countries reached their highest spot prices of the week during this period.



Prices Spread

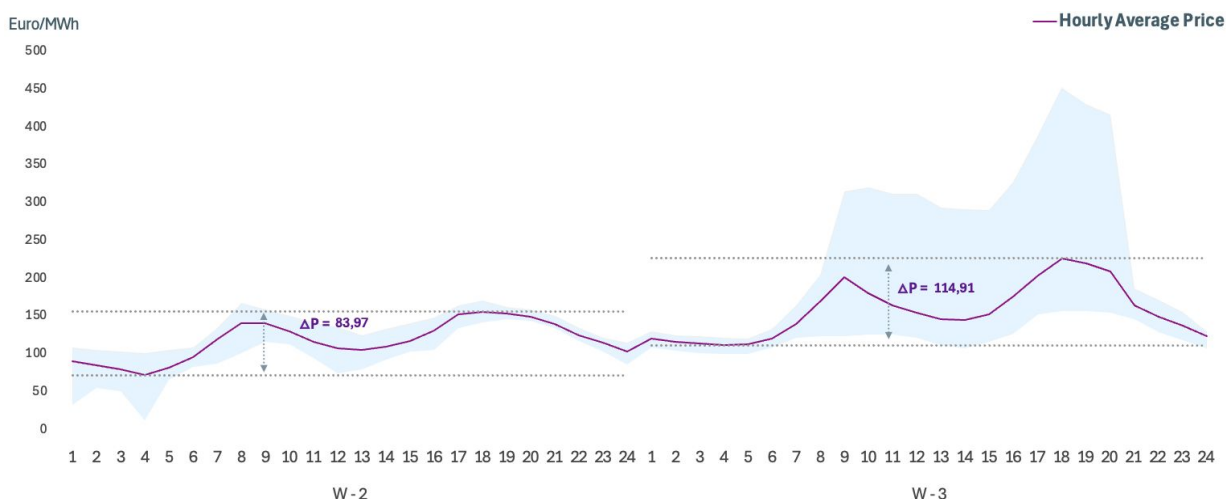
Hour (CET)	Monday 13-Jan	Tuesday 14-Jan	Wednesday 15-Jan	Thursday 16-Jan	Friday 17-Jan	Saturday 18-Jan	Sunday 19-Jan	Average Price Week	Average Price Weekdays	Average Price Weekend
1	112,39	109,31	119,98	126,33	123,49	126,09	129,88	121,07	118,30	127,99
2	105,07	106,29	111,60	122,83	121,74	121,20	124,89	116,23	113,51	123,05
3	104,46	101,94	110,69	118,24	118,71	121,36	123,61	114,14	110,81	122,49
4	100,37	100,62	108,67	115,91	116,94	118,90	121,24	111,81	108,50	120,07
5	100,00	103,80	118,11	119,37	117,21	116,94	120,18	113,66	111,70	118,56
6	110,17	109,03	132,62	129,58	123,57	119,82	120,00	120,68	120,99	119,91
7	140,11	138,13	152,22	163,80	140,80	123,63	121,67	140,05	147,01	122,65
8	188,09	161,89	197,46	204,18	175,01	135,37	123,98	169,43	185,33	129,68
9	229,55	185,47	315,14	206,06	208,13	145,90	123,66	201,99	228,87	134,78
10	175,00	151,98	320,08	175,00	175,34	144,10	125,95	181,06	199,48	135,03
11	141,08	130,11	311,49	151,90	157,74	133,44	126,29	164,58	178,46	129,87
12	122,68	123,46	311,84	140,64	140,68	121,74	123,79	154,98	167,86	122,77
13	117,70	119,13	293,49	134,76	126,44	118,87	112,25	146,09	158,30	115,56
14	123,60	120,00	290,75	137,98	124,03	115,01	107,51	145,55	159,27	111,26
15	130,96	135,60	290,53	146,00	133,68	119,58	116,81	153,31	167,35	118,20
16	144,28	173,62	327,98	173,30	152,20	138,54	127,28	176,74	194,28	132,91
17	162,19	197,14	386,98	186,88	173,59	172,32	152,73	204,55	221,36	162,53
18	156,83	262,99	452,13	195,47	179,35	172,53	167,73	226,72	249,35	170,13
19	157,07	250,63	430,59	184,32	179,92	167,57	169,81	219,99	240,51	168,69
20	154,66	205,29	416,51	179,97	174,22	167,85	170,00	209,79	226,13	168,93
21	146,85	181,49	186,30	159,60	157,91	156,12	164,79	164,72	166,43	160,46
22	128,97	171,11	152,90	152,77	145,00	143,42	157,00	150,17	150,15	150,21
23	119,17	155,07	143,29	140,69	139,97	136,40	133,82	138,34	139,64	135,11
24	107,80	124,32	123,90	129,85	127,92	129,36	123,81	123,85	122,76	126,59
Average	136,63	150,77	241,89	153,98	147,23	136,09	132,86	157,06	166,10	134,47
ΔPrice	129,55	162,37	343,46	90,15	91,19	57,52	62,49	114,91	140,85	58,87

Maximum

Minimum

[Euro/MWh]

On Wednesday, January 15th, during the 6 PM time slot, **Romania hit its highest hourly price for the week at €452,13/MWh, triggered by an increase in demand.** The average price for the weekend was €134,47/MWh, while weekdays saw an average of €166,10/MWh.

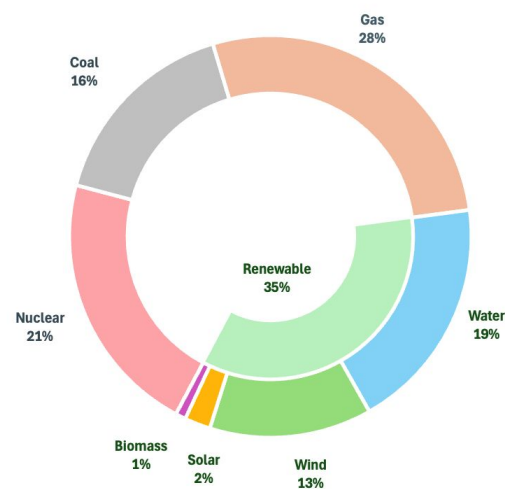


The price spread expanded, **rising from €83,97 to €114,91**. It's a clear sign of increased volatility, as we a more noticeable difference between peak and off-peak prices.



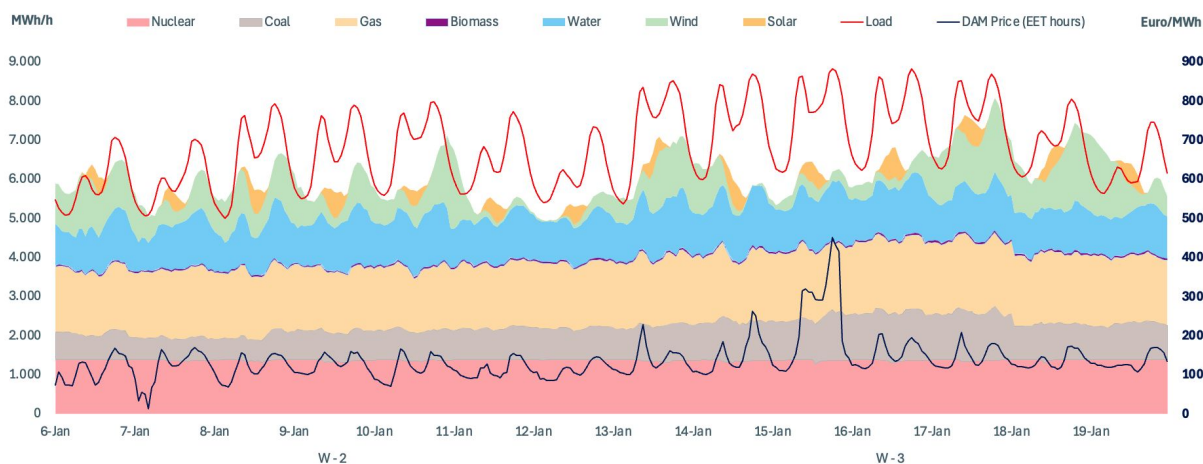
Energy Overview

	EET Hours		
	Week 2 GWh	Week 3 GWh	Variation %
PRODUCTION	966	1.080	11,9%
Nuclear	231	230	-0,3%
Coal	122	176	44,4%
Gas	276	297	7,6%
Water	194	204	5,4%
Wind	117	141	20,6%
Solar	18	23	25,8%
Biomass	8	9	16,8%
LOAD	1.073	1.217	13,4%
SOLD	-108	-137	27,0%
DAM Price (EET hours) [Euro/MWh]	117,40	157,01	33,7%



Romania's energy production grew by 12% compared to last week, with the most significant increases coming from coal, wind, and solar energy. Renewable sources played a key part in this rise, helping maintain a balanced energy mix.

Hourly Generation



Romania's energy consumption increased by 13%, reaching an average of over 7,200 MWh/h, the highest we've seen since 2023.

As a result, Romania found itself **importing more than 70% of its energy** during the week - which wasn't entirely unexpected given the higher demand.



European Day Ahead Market Prices



Energy prices across Europe were on the rise, with most markets seeing prices above €130/MWh. But it wasn't the same story everywhere. In the southern regions, including Spain and Portugal, prices increased, while the northern countries kept their prices lower, with most staying under €90/MWh.

Germany really stood out, with a 63% increase in prices compared to last week, setting a new high for the period. Over in Spain, Portugal, France, and Poland, prices followed a similar upward trend, reaching the highest levels they've seen in two years.



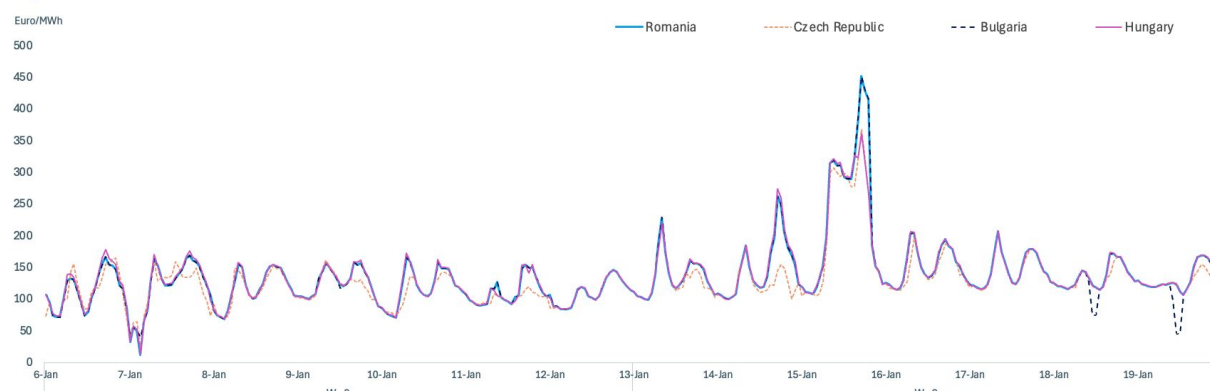
European Energy Context

DAM PRICES

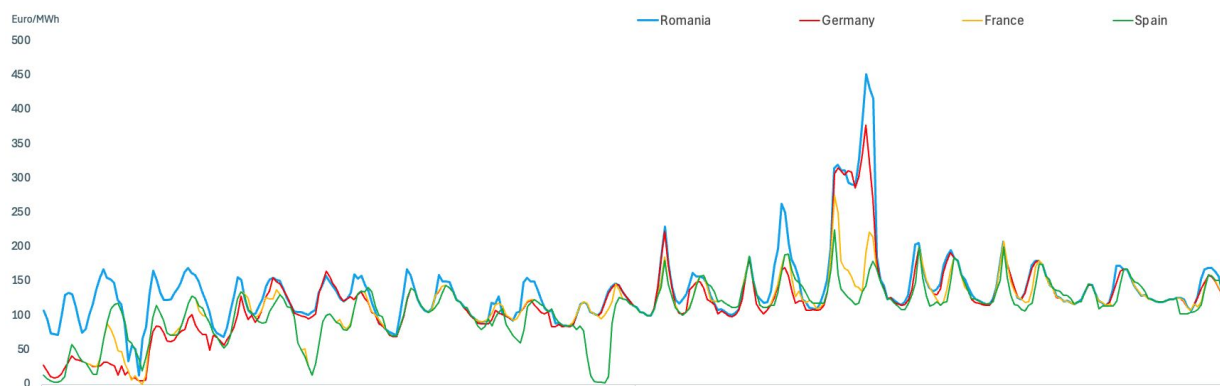
CET Hours

	Week 2 [Euro/MWh]	Week 3 [Euro/MWh]	Variation %
Romania	117,64	157,06	33,5%
Bulgaria	117,84	155,47	31,9%
Hungary	118,84	155,13	30,5%
Czech Republic	113,21	146,92	29,8%
Germany	90,56	147,93	63,4%
France	89,65	137,71	53,6%
Spain	85,19	133,33	56,5%

Region



Europe





Energy belongs to everyone!

Wiren is an renewable energy & infrastructure solutions group with strong emphasis on EPC and PV/BESS development.

Our purpose is rooted in the belief that energy should be clean, sustainable, and accessible to everyone. With a commitment to innovation and excellence, we constantly challenge and reshape the energy industry.

Our vision is to make renewable energy a universal right, transforming how the world accesses and utilizes energy.

By continuously innovating and removing barriers to energy access, we strive to make renewable resources a tangible reality for communities and industries worldwide.

Disclaimer

Wiren Weekly Energy Report (WVER) is a personalized guide to the Romanian and European energy markets, with focus on most important highlights and events from previous week.

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