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WEEKLY ENERGY REPORT

04 / 2025

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Day Ahead Market Price

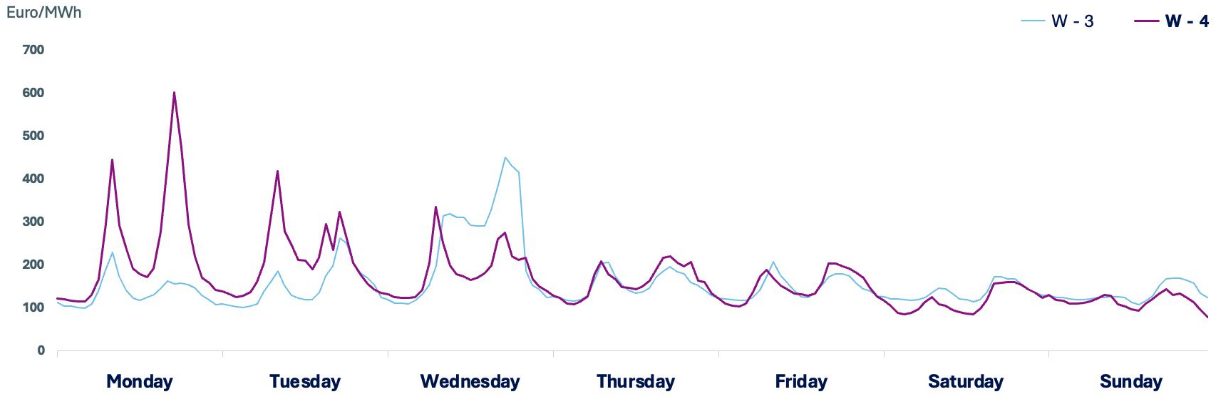
DAM PRICES	Week 3 [Euro/MWh]	Week 4 [Euro/MWh]	Variation %
Average Price	157,06	168,43	7,2%
Maximum Price	452,13	603,30	33,4%
Minimum Price	100,00	77,90	-22,1%
∆Price = max(average) - min(average)	114,91	164,96	43,6%

CET Hours

Romania's energy prices hit €168,43/MWh, which landed us in third place in Europe. Slovakia took the top spot at €178/MWh, while Hungary came in second with €171/MWh. Looking at the numbers compared to the week before, we saw a 7,2% bump in average prices.

But what really catches the eye is how much the gap between the highest and lowest prices grew - **it expanded by 43,6%** compared to the week before.

Hourly Prices



On Monday, January 20th, during the **18th time slot**, Hungary saw the highest price of the week, hitting €615,15/MWh. And it wasn't just Hungary - almost half of the European markets saw their prices top €500/MWh during that hour.

But it didn't stop there. In the very next time slot, France set a new record for the highest national price between 2023 and 2025, reaching €473,28/MWh. Romania was part of this moment, as **14 European markets - including ours - that were coupled, had their price pushed higher.**

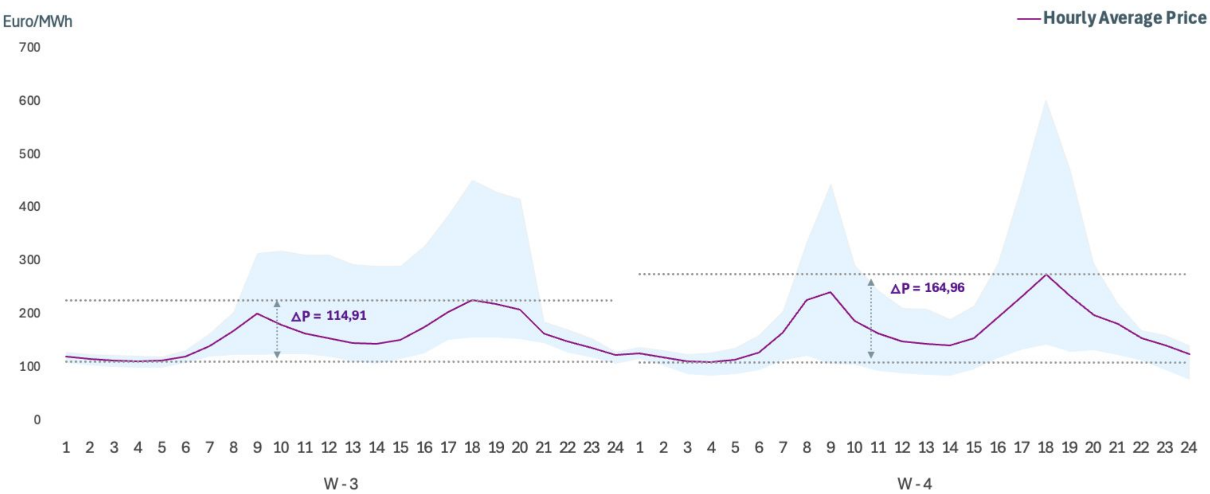
Prices Spread

Hour (CET)	Monday 20-Jan	Tuesday 21-Jan	Wednesday 22-Jan	Thursday 23-Jan	Friday 24-Jan	Saturday 25-Jan	Sunday 26-Jan	Average Price Week	Average Price Weekdays	Average Price Weekend
1	122,44	138,01	131,15	128,65	122,59	116,40	130,13	**127,05**	**128,57**	**123,27**
2	119,76	132,03	125,75	123,55	110,34	105,08	119,03	**119,36**	**122,29**	**112,06**
3	116,60	125,69	123,93	110,35	104,35	88,87	116,21	**112,29**	**116,18**	**102,54**
4	114,41	127,98	124,01	109,05	103,10	85,76	110,35	**110,67**	**115,71**	**98,06**
5	115,45	137,66	125,84	115,28	109,51	88,36	110,34	**114,63**	**120,75**	**99,35**
6	129,57	160,57	141,64	126,84	136,50	96,00	112,48	**129,09**	**139,02**	**104,24**
7	166,11	205,19	205,36	179,91	173,65	114,28	114,86	**165,62**	**186,04**	**114,57**
8	296,08	317,17	335,72	207,89	189,12	124,78	122,15	**227,56**	**269,20**	**123,47**
9	445,00	419,10	252,60	177,82	169,00	108,25	130,28	**243,15**	**292,70**	**119,27**
10	291,80	278,94	199,41	167,75	151,20	106,00	127,74	**188,98**	**217,82**	**116,87**
11	236,29	244,81	179,06	148,96	143,54	95,00	108,62	**165,18**	**190,53**	**101,81**
12	191,48	212,13	172,94	146,36	132,73	89,79	103,57	**149,86**	**171,13**	**96,68**
13	178,49	210,00	165,00	142,94	131,09	86,65	97,01	**144,45**	**165,50**	**91,83**
14	171,39	190,42	170,00	150,80	128,95	85,36	94,10	**141,57**	**162,31**	**89,73**
15	191,83	216,28	180,00	164,21	133,30	97,94	110,34	**156,27**	**177,12**	**104,14**
16	276,81	296,09	199,35	192,30	159,26	118,92	120,13	**194,69**	**224,76**	**119,53**
17	442,13	234,60	260,93	217,58	203,54	156,51	134,18	**235,64**	**271,76**	**145,35**
18	603,30	324,51	274,66	220,59	204,18	158,87	143,28	**275,63**	**325,45**	**151,08**
19	473,28	262,02	220,29	205,16	196,75	160,15	130,58	**235,46**	**271,50**	**145,37**
20	295,57	205,98	212,53	196,21	192,29	160,50	133,78	**199,55**	**220,52**	**147,14**
21	220,00	178,15	217,21	207,20	181,32	152,86	124,12	**182,98**	**200,78**	**138,49**
22	170,00	157,15	166,43	163,79	170,41	143,90	114,15	**155,12**	**165,56**	**129,03**
23	158,18	143,49	150,92	160,56	146,81	135,99	95,36	**141,62**	**151,99**	**115,68**
24	141,99	135,88	140,00	133,78	127,15	124,19	77,90	**125,84**	**135,76**	**101,05**
Average	**236,17**	**210,58**	**186,45**	**162,40**	**150,86**	**116,68**	**115,86**	**168,43**	**189,29**	**116,27**
ΔPrice	**488,89**	**293,41**	**211,79**	**111,54**	**101,08**	**75,14**	**65,38**	**164,96**	**209,74**	**61,35**

Maximum Minimum

[Euro/MWh]

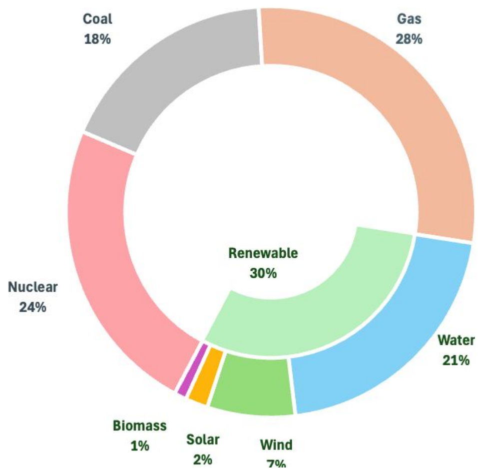
On Monday, we saw **the highest price of the week, €603.30/MWh**, while Sunday brought the lowest at €77.90/MWh. The week's average came in at €168,43/MWh, with weekdays sitting at €189,29/MWh, and the weekend a bit more relaxed at €116,27/MWh.



This week, **the price spread widened by 43,6%** compared to the previous week. With a higher peak and a lower minimum, the market saw more notable variations in price levels.

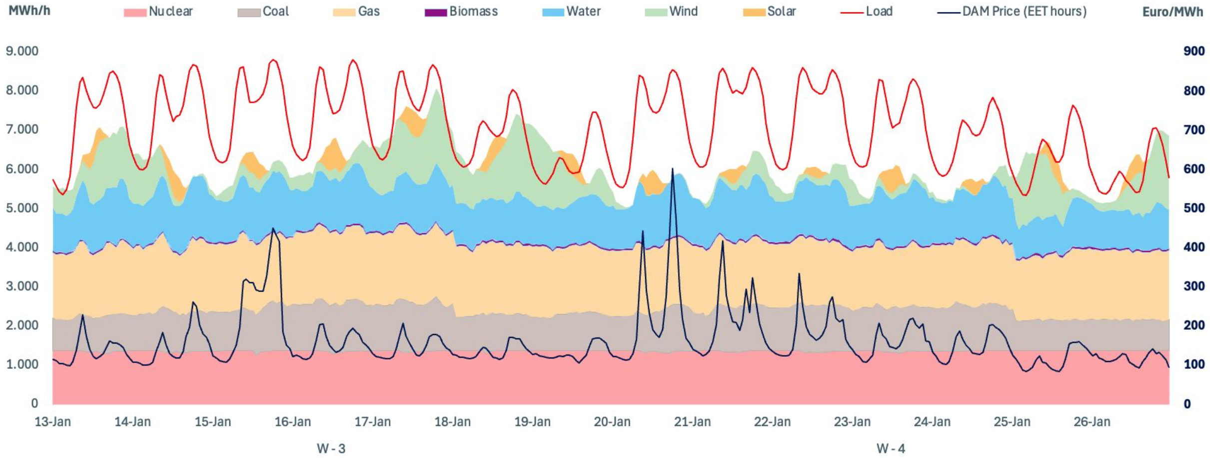
Energy Overview

EET Hours	Week 3	Week 4	Variation
	GWh	GWh	%
PRODUCTION	1.080	976	-9,6%
Nuclear	230	231	0,1%
Coal	176	172	-2,0%
Gas	297	277	-6,7%
Water	204	202	-1,3%
Wind	141	68	-52,0%
Solar	23	17	-22,9%
Biomass	9	9	6,8%
LOAD	1.217	1.171	-3,8%
SOLD	-137	-195	42,2%
DAM Price (EET hours) [Euro/MWh]	157,01	168,70	7,4%



Although Romania's energy consumption dropped this week, the decline in production, particularly from renewable sources, led to **a rise in energy imports.** Wind and solar production both saw notable reductions, with wind energy falling over 50% and solar output dropping nearly 23%.

Hourly Generation



In the past two weeks, fossil fuel-based energy production has remained high, stepping in to cover for renewable energy sources, which have been at their lowest levels in the national production mix. While renewables still make up a solid portion of the mix, fossil fuels are taking on a larger role in ensuring a stable energy supply.

European Day Ahead Market Prices

In the western part of the continent, things went down, with Spain and Portugal seeing prices drop by 23%, France by 18%, Belgium by 10%, and the Netherlands by 8%. Germany, the Czech Republic, and Poland also saw lower prices.

The rest of Europe saw prices go up, especially in Scandinavia. Finland's prices shot up six times compared to last week, Sweden's tripled, and Norway doubled its prices. Still, despite the big jumps, prices in this region stayed below €70/MWh.

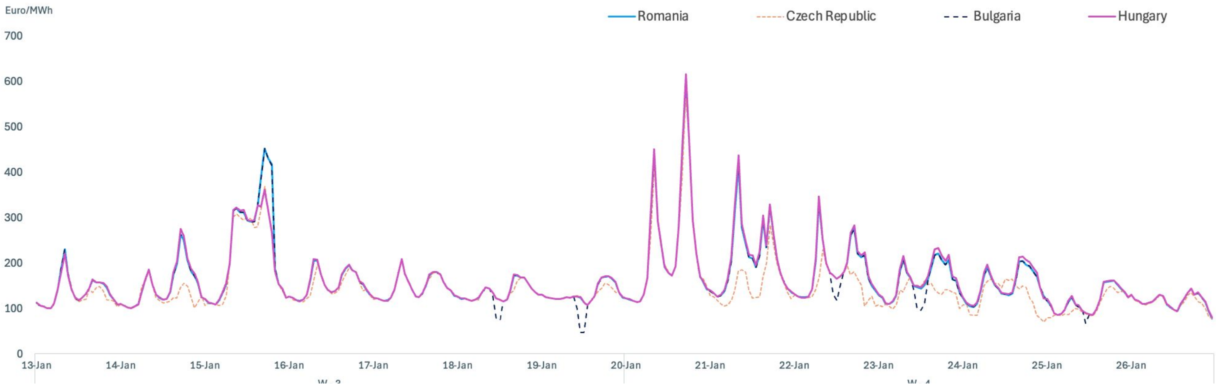
European Energy Context

DAM PRICES

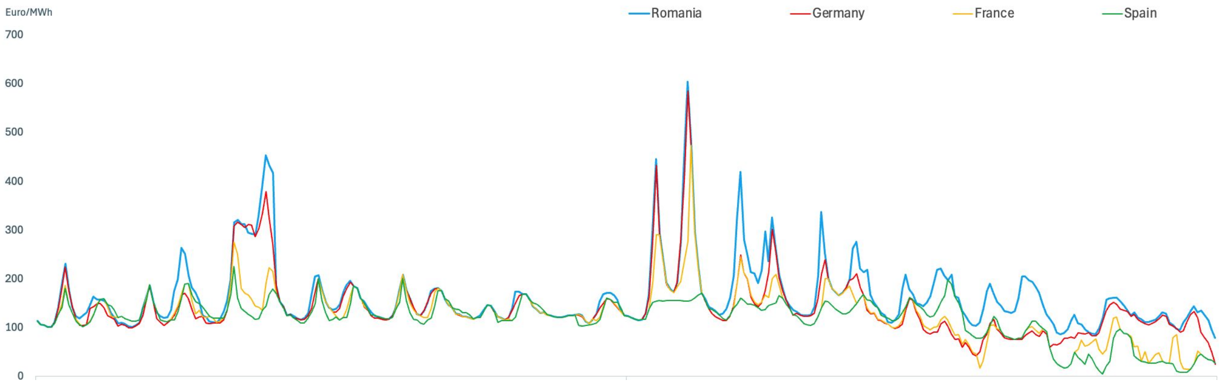
CET Hours

	Week 3 [Euro/MWh]	Week 4 [Euro/MWh]	Variation %
Romania	157,06	168,43	**7,2%**
Bulgaria	155,47	166,71	**7,2%**
Hungary	155,13	171,11	**10,3%**
Czech Republic	146,92	144,83	**-1,4%**
Germany	147,93	134,98	**-8,8%**
France	137,71	113,11	**-17,9%**
Spain	133,33	103,10	**-22,7%**

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 (WWER) 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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