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# WEEKLY ENERGY REPORT

06 / 2025

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# Day Ahead Market Price

## DAM PRICES

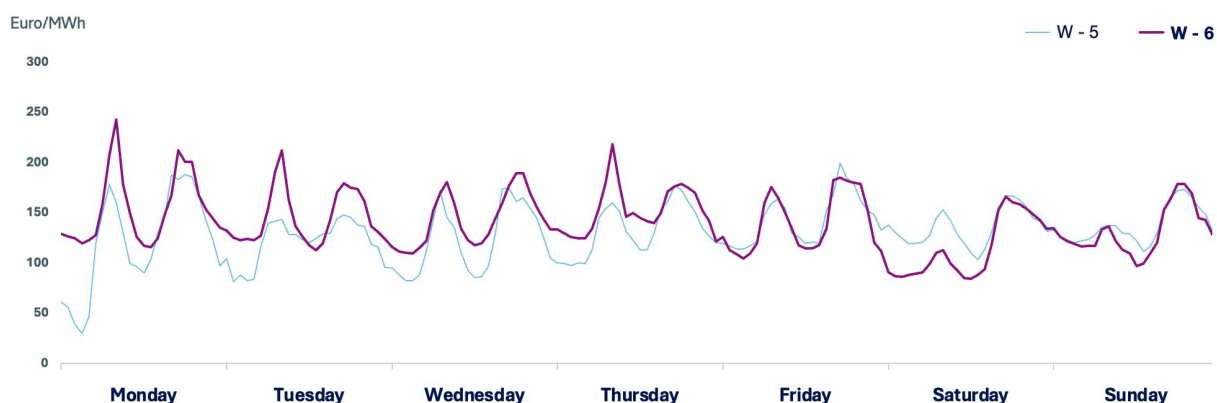
CET Hours

|                                                                    | Week 5<br>[Euro/MWh] | Week 6<br>[Euro/MWh] | Variation<br>% |
|--------------------------------------------------------------------|----------------------|----------------------|----------------|
| Average Price                                                      | 130,68               | 140,21               | 7,3%           |
| Maximum Price                                                      | 200,00               | 243,23               | 21,6%          |
| Minimum Price                                                      | 30,08                | 84,84                | 182,0%         |
| $\Delta\text{Price} = \max(\text{average}) - \min(\text{average})$ | 80,96                | 68,27                | -15,7%         |

In nearly every region - aside from the Nordic countries - average prices exceeded 120 EUR/MWh. Compared to the previous week, **Romania's average price increased by 7,3%.** **The highest price rose by 21,6%,** while on the other end of the spectrum, **the lowest recorded price soared by 182%.**

While most of the continent **faces a clear trend of rising costs, with prices doubling** compared to the same period last year, the Nordics presented a rare exception, managing to lower their energy prices in contrast to the rest.

## Hourly Prices



**In Romania,** the story played out on Monday, February 3rd, at hour 9, when **prices hit 243,23 EUR/MWh** - the highest level recorded during the week. This wasn't a one-off event, as **17 other European markets** registered similar price highs at that same moment.

The highest hourly price in Europe this week was recorded in the Baltic countries, reaching 325,07 EUR/MWh. This happened on Sunday, February 9th, during hour 17 - coinciding with their full disconnection from the BRELL system.



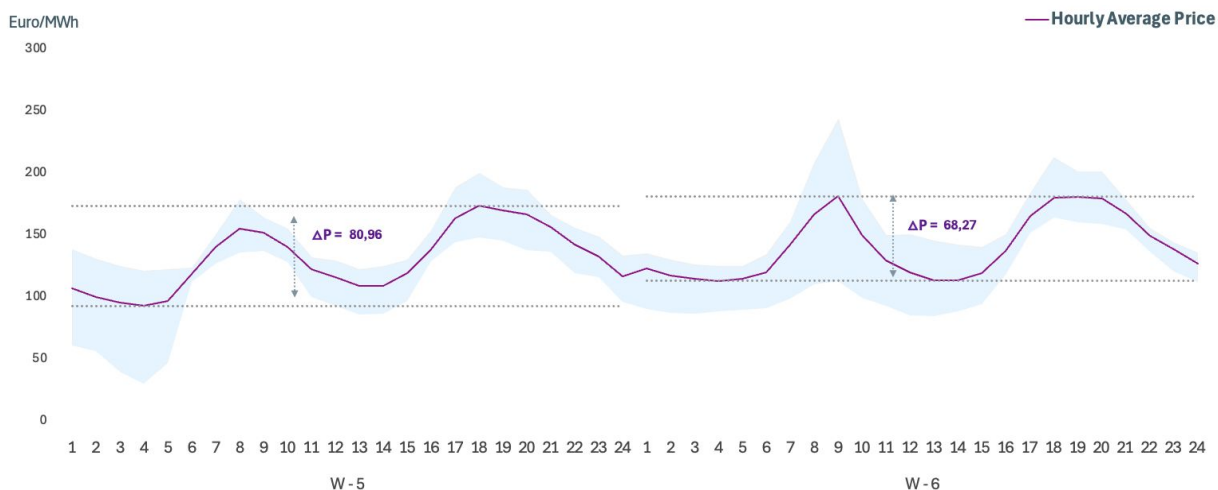
# Prices Spread

| Hour (CET) | Monday 3-Feb | Tuesday 4-Feb | Wednesday 5-Feb | Thursday 6-Feb | Friday 7-Feb | Saturday 8-Feb | Sunday 9-Feb | Average Price Week | Average Price Weekdays | Average Price Weekend |
|------------|--------------|---------------|-----------------|----------------|--------------|----------------|--------------|--------------------|------------------------|-----------------------|
| 1          | 129,54       | 132,40        | 115,99          | 133,67         | 126,05       | 90,73          | 135,00       | 123,34             | 127,53                 | 112,87                |
| 2          | 126,63       | 125,54        | 111,37          | 129,92         | 112,70       | 87,34          | 125,82       | 117,05             | 121,23                 | 106,58                |
| 3          | 124,72       | 123,18        | 110,65          | 125,98         | 108,82       | 86,64          | 121,67       | 114,52             | 118,67                 | 104,16                |
| 4          | 120,04       | 123,99        | 109,48          | 125,00         | 105,00       | 88,62          | 119,30       | 113,06             | 116,70                 | 103,96                |
| 5          | 123,24       | 123,25        | 115,54          | 125,01         | 110,00       | 89,69          | 116,81       | 114,79             | 119,41                 | 103,25                |
| 6          | 127,77       | 127,63        | 122,53          | 134,22         | 119,88       | 90,99          | 117,00       | 120,00             | 126,41                 | 104,00                |
| 7          | 159,18       | 155,17        | 152,34          | 154,19         | 160,33       | 98,74          | 117,00       | 142,42             | 156,24                 | 107,87                |
| 8          | 207,88       | 190,74        | 169,31          | 180,09         | 175,54       | 110,52         | 133,43       | 166,79             | 184,71                 | 121,98                |
| 9          | 243,23       | 211,99        | 180,81          | 218,52         | 165,21       | 112,77         | 136,77       | 181,33             | 203,95                 | 124,77                |
| 10         | 178,04       | 163,31        | 159,33          | 178,85         | 150,50       | 99,43          | 122,01       | 150,21             | 166,01                 | 110,72                |
| 11         | 149,95       | 136,53        | 134,15          | 146,48         | 134,71       | 93,02          | 113,44       | 129,75             | 140,36                 | 103,23                |
| 12         | 126,19       | 126,77        | 122,97          | 150,22         | 117,95       | 85,37          | 109,53       | 119,86             | 128,82                 | 97,45                 |
| 13         | 117,27       | 117,85        | 117,79          | 145,09         | 114,48       | 84,84          | 97,39        | 113,53             | 122,50                 | 91,12                 |
| 14         | 115,72       | 113,19        | 119,85          | 142,00         | 114,71       | 88,57          | 99,88        | 113,42             | 121,09                 | 94,23                 |
| 15         | 124,52       | 120,09        | 128,85          | 140,08         | 117,93       | 94,00          | 109,90       | 119,34             | 126,29                 | 101,95                |
| 16         | 148,13       | 143,35        | 144,12          | 150,20         | 134,48       | 118,00         | 120,40       | 136,95             | 144,06                 | 119,20                |
| 17         | 167,45       | 171,08        | 159,65          | 171,71         | 182,86       | 152,27         | 153,18       | 165,46             | 170,55                 | 152,73                |
| 18         | 212,35       | 179,72        | 177,08          | 176,56         | 184,98       | 166,14         | 164,47       | 180,19             | 186,14                 | 165,31                |
| 19         | 200,73       | 175,00        | 189,90          | 178,85         | 182,15       | 160,56         | 178,85       | 180,86             | 185,33                 | 169,71                |
| 20         | 201,10       | 173,92        | 189,63          | 175,04         | 180,19       | 159,03         | 178,85       | 179,68             | 183,98                 | 168,94                |
| 21         | 167,74       | 162,05        | 170,00          | 170,20         | 178,85       | 154,45         | 169,46       | 167,54             | 169,77                 | 161,96                |
| 22         | 153,00       | 136,64        | 155,42          | 152,77         | 153,72       | 149,00         | 145,00       | 149,36             | 150,31                 | 147,00                |
| 23         | 144,20       | 131,34        | 143,70          | 141,74         | 120,70       | 142,78         | 143,00       | 138,21             | 136,34                 | 142,89                |
| 24         | 135,81       | 123,98        | 133,90          | 121,95         | 112,25       | 134,15         | 128,90       | 127,28             | 125,58                 | 131,53                |
| Average    | 154,35       | 145,36        | 143,10          | 152,85         | 140,17       | 114,07         | 131,54       | 140,21             | 147,17                 | 122,81                |
| ΔPrice     | 127,51       | 98,80         | 80,42           | 96,57          | 79,98        | 81,30          | 81,46        | 68,27              | 87,25                  | 78,59                 |

Maximum Minimum

[Euro/MWh]

On Saturday, February 8th, **the lowest price of the week was recorded at 84,84 EUR/MWh**. For the full week, the average price was 140,21 EUR/MWh. A closer look shows differences between weekdays and weekends - weekday prices averaged **147,17 EUR/MWh**, while the weekend brought prices down to **122,81 EUR/MWh**.

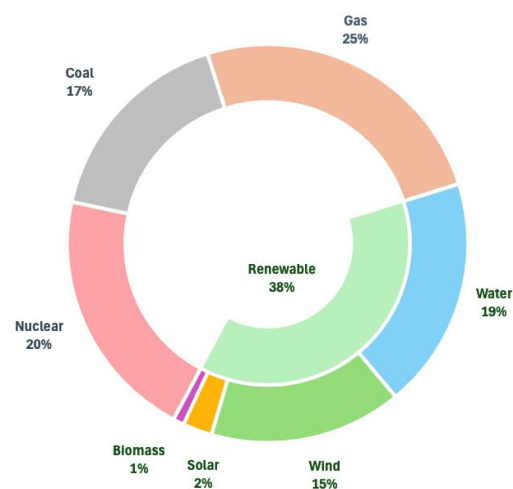


Last week, the difference between maximum and minimum hourly prices was **68,27 EUR/MWh**, a decrease from the previous week's spread of 80.96 EUR/MWh - indicating that price volatility eased slightly.



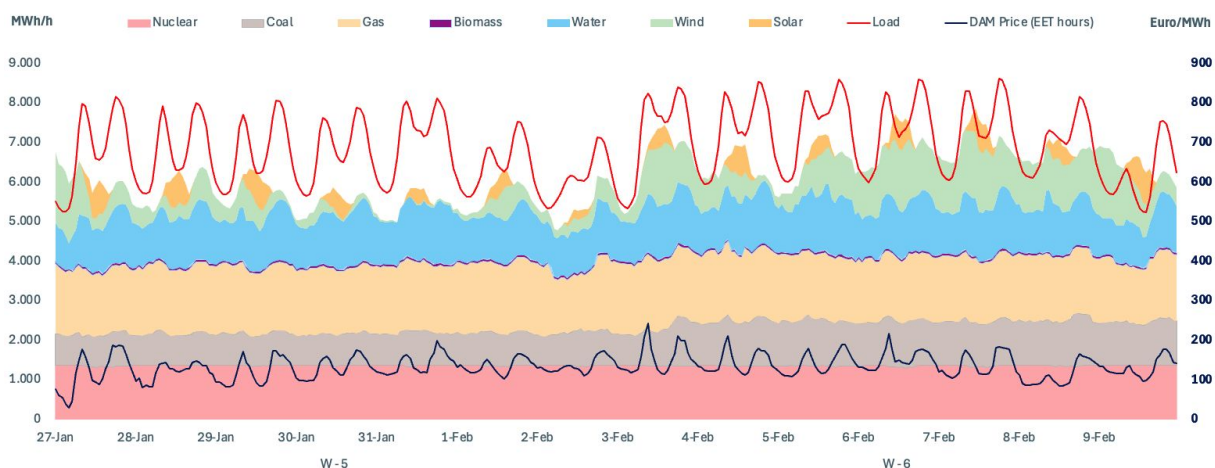
# Energy Overview

|                                         | EET Hours     |               |                |
|-----------------------------------------|---------------|---------------|----------------|
|                                         | Week 5<br>GWh | Week 6<br>GWh | Variation<br>% |
| <b>PRODUCTION</b>                       | <b>953</b>    | <b>1.116</b>  | <b>17,0%</b>   |
| Nuclear                                 | 231           | 230           | -0,5%          |
| Coal                                    | 138           | 187           | 36,1%          |
| Gas                                     | 283           | 279           | -1,2%          |
| Water                                   | 204           | 210           | 2,8%           |
| Wind                                    | 65            | 174           | 165,7%         |
| Solar                                   | 23            | 26            | 13,4%          |
| Biomass                                 | 10            | 10            | 2,9%           |
| <b>LOAD</b>                             | <b>1.123</b>  | <b>1.194</b>  | <b>6,4%</b>    |
| <b>SOLD</b>                             | <b>-169</b>   | <b>-79</b>    | <b>-53,5%</b>  |
| <b>DAM Price (EET hours) [Euro/MWh]</b> | <b>130,35</b> | <b>140,23</b> | <b>7,6%</b>    |



Last week saw an increase in electricity consumption, but production outpaced it. With **demand rising by 6.4%** and **supply growing by 17%**, the gap between generation and consumption widened.

## Hourly Generation



Renewable energy output fluctuated significantly last week, **with wind production increasing by 166%**. At the same time, coal generation reached its highest level for the 2024-2025 period, contributing heavily to overall energy production.

On Sunday, February 9th, internal energy production in Romania surpassed national demand for the only time that week. Despite this, the lowest average daily price - **113,16 EUR/MWh** - was recorded on Saturday. Meanwhile, Monday registered the highest average daily price of the week, at **154,24 EUR/MWh**.



# European Day Ahead Market Prices



After price increases across all European markets the previous week, the trend continued on most of the continent, with only Norway and Sweden seeing price declines. **The strongest price growth occurred in Portugal (+95%), Spain (+94%), and France (+52%).**

In France and Italy, weekly prices increased to their highest levels since 2023, setting new benchmarks for the current period. Over in Spain and Portugal, hourly prices reached record highs for the Iberian Peninsula, the highest seen in the last two years.



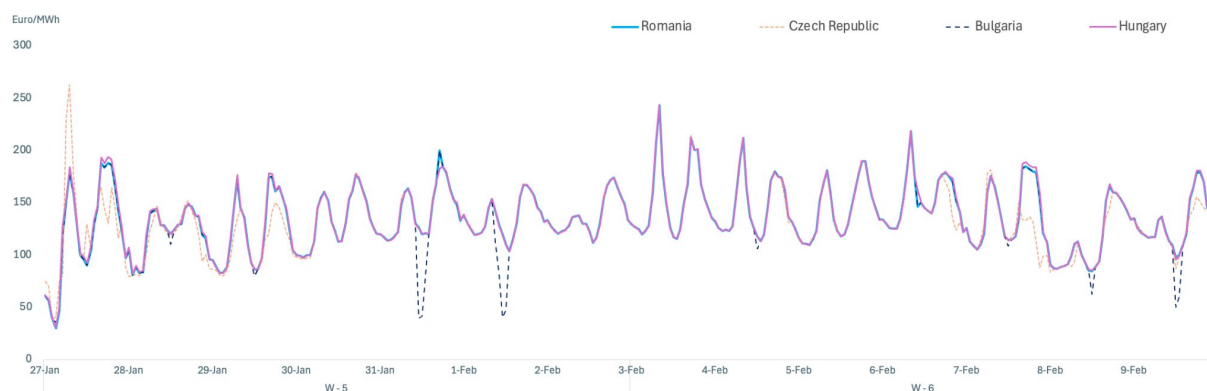
# European Energy Context

## DAM PRICES

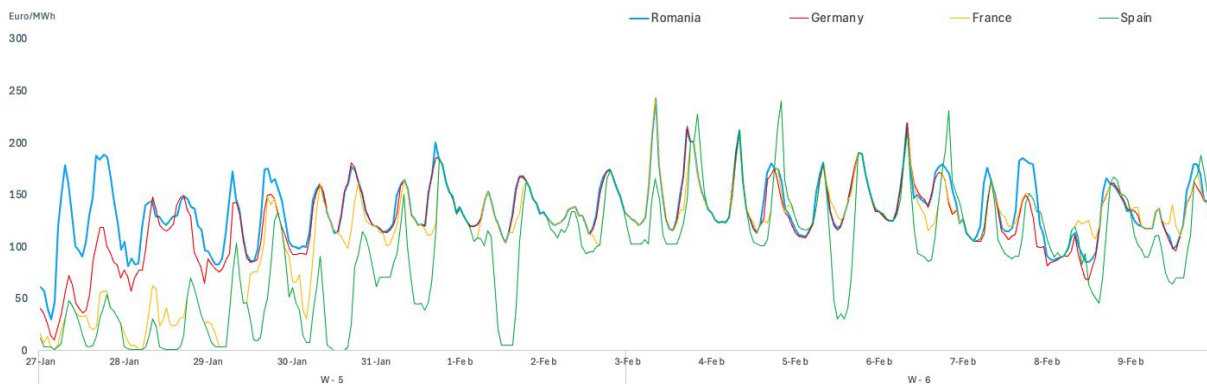
CET Hours

|                | Week5<br>[Euro/MWh] | Week6<br>[Euro/MWh] | Variation<br>% |
|----------------|---------------------|---------------------|----------------|
| Romania        | 130,68              | 140,21              | 7,3%           |
| Bulgaria       | 128,08              | 139,43              | 8,9%           |
| Hungary        | 131,23              | 140,61              | 7,1%           |
| Czech Republic | 128,33              | 136,56              | 6,4%           |
| Germany        | 117,12              | 135,31              | 15,5%          |
| France         | 90,57               | 138,06              | 52,4%          |
| Spain          | 63,68               | 123,59              | 94,1%          |

### 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.

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## Disclaimer

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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.