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WEEKLY ENERGY REPORT

18 / 2025

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Day Ahead Market Price

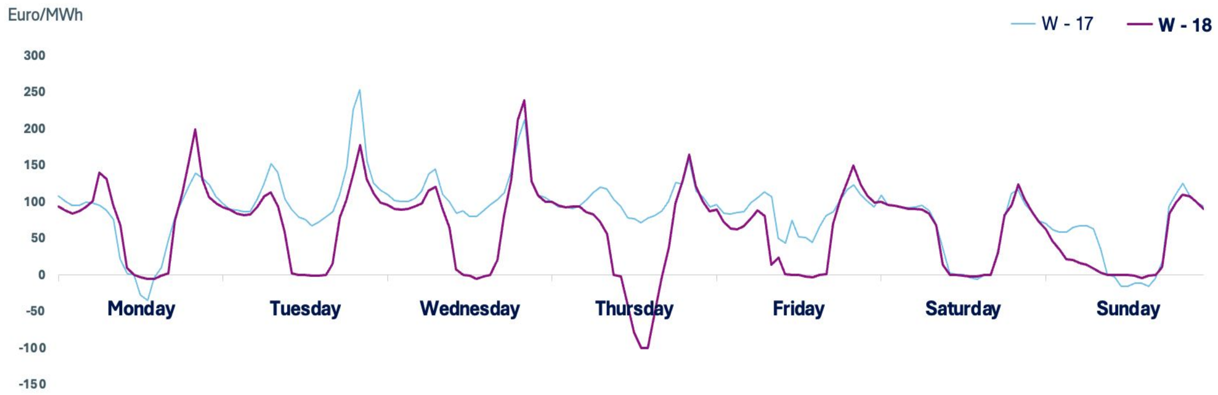
DAM PRICES	Week 17 [Euro/MWh]	Week 18 [Euro/MWh]	Variation %
Average Price	**84,18**	**61,17**	**-27,34%**
Maximum Price	**253,12**	**238,63**	**-5,72%**
Minimum Price	**-35,55**	**-100,63**	**-183,07%**
ΔPrice = max(average) - min(average)	**129,99**	**183,09**	**40,85%**

CET Hours

Romania's average price decreased to **61,17 EUR/MWh** last week, down **27,34%** compared to the previous one. The minimum price reached **-100,63 EUR/MWh**, while the maximum edged down to **238,63 EUR/MWh**.

The overall price spread widened to **183,09 EUR/MWh** (+40.85%), driven mainly by deeper off-peak values. On May 1st, hourly prices in Romania fell below **-100 EUR/MWh**, while **record negative hourly prices** for the past five years were recorded in **Bulgaria, Spain, Greece, Poland, and Slovakia**.

Hourly Prices



Romania registered its maximum hourly price of the week (**238,63 EUR/MWh**) during the **21 time slot on Wednesday, April 30th**, matching the same value recorded in neighbouring Bulgaria.

That same evening time slot, but one day later - on **Thursday, May 1st (Labour Day)** - marked the highest hourly price in Europe: **339,99 EUR/MWh**, recorded across the **Baltic states**.

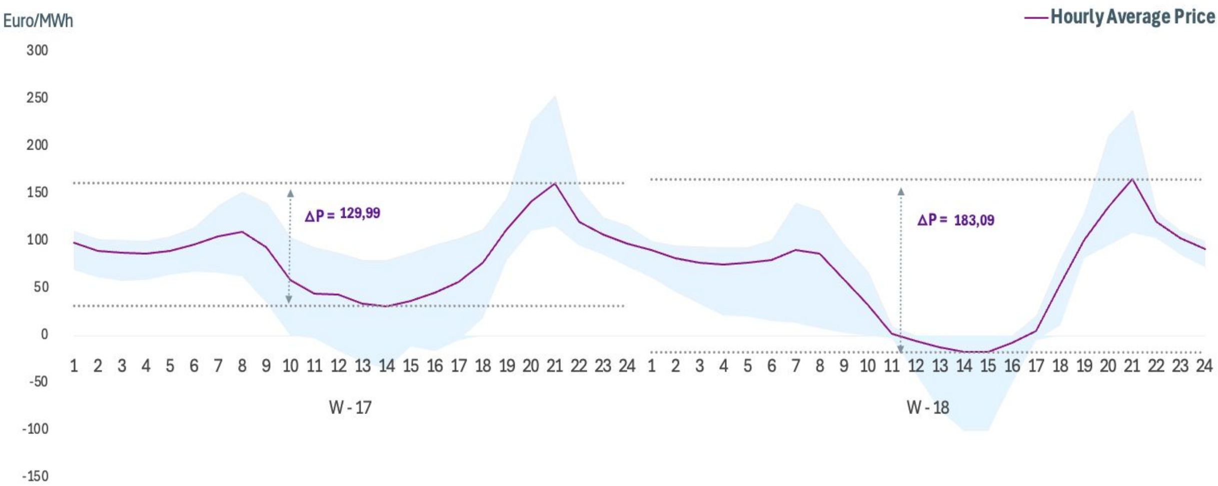
Prices Spread

Hour (CET)	Monday 28-Apr	Tuesday 29-Apr	Wednesday 30-Apr	Thursday 1-May	Friday 2-May	Saturday 3-May	Sunday 4-May	Average Price Week	Average Price Weekdays	Average Price Weekend
1	93,55	92,32	95,00	99,63	88,54	99,47	61,54	**90,01**	**93,81**	**80,51**
2	87,96	88,35	90,08	93,88	73,03	95,16	45,85	**82,04**	**86,66**	**70,51**
3	83,64	83,48	89,20	92,32	62,83	93,69	33,47	**76,95**	**82,29**	**63,58**
4	86,69	81,22	89,75	92,60	62,38	91,94	21,14	**75,10**	**82,53**	**56,54**
5	92,21	82,35	93,33	92,63	66,33	89,72	20,31	**76,70**	**85,37**	**55,02**
6	100,50	91,99	97,18	85,76	76,60	89,89	15,58	**79,64**	**90,41**	**52,74**
7	139,74	106,99	115,00	81,97	87,84	89,00	13,62	**90,59**	**106,31**	**51,31**
8	131,09	112,96	120,31	72,44	79,75	83,85	7,83	**86,89**	**103,31**	**45,84**
9	95,33	93,16	91,02	55,93	13,63	66,90	2,93	**59,84**	**69,81**	**34,92**
10	67,37	58,31	64,36	0,00	22,83	13,53	0,00	**32,34**	**42,57**	**6,77**
11	9,41	1,51	7,08	-3,00	0,85	0,01	-0,01	**2,26**	**3,17**	**0,00**
12	-0,01	0,00	0,00	-40,10	-0,01	-0,01	-0,01	**-5,73**	**-8,02**	**-0,01**
13	-3,47	-0,76	-1,00	-79,20	-0,80	-1,16	-0,02	**-12,34**	**-17,05**	**-0,59**
14	-5,90	-1,90	-6,21	-100,59	-3,00	-3,04	-2,00	**-17,52**	**-23,52**	**-2,52**
15	-6,18	-1,00	-3,00	-100,63	-4,00	-2,69	-5,01	**-17,50**	**-22,96**	**-3,85**
16	-1,54	0,00	-0,02	-49,99	-0,08	-0,03	-1,59	**-7,61**	**-10,33**	**-0,81**
17	2,16	15,00	20,29	-5,17	0,30	0,00	-0,01	**4,65**	**6,52**	**-0,01**
18	73,31	78,35	80,20	37,62	69,83	29,46	10,54	**54,19**	**67,86**	**20,00**
19	110,32	102,00	129,35	97,46	102,44	81,71	83,59	**100,98**	**108,31**	**82,65**
20	153,46	139,89	211,24	128,73	125,54	94,90	99,03	**136,11**	**151,77**	**96,97**
21	198,18	177,38	238,63	164,02	148,78	123,00	109,01	**165,57**	**185,40**	**116,01**
22	129,31	130,64	127,88	121,05	123,13	103,17	106,68	**120,27**	**126,40**	**104,93**
23	106,13	109,81	108,69	100,07	108,69	85,88	100,10	**102,77**	**106,68**	**92,99**
24	97,01	98,76	99,62	86,50	98,46	72,37	89,78	**91,79**	**96,07**	**81,08**
Average	**76,68**	**72,53**	**81,58**	**46,83**	**58,50**	**58,20**	**33,85**	**61,17**	**67,22**	**46,02**
ΔPrice	**204,36**	**179,28**	**244,84**	**264,65**	**152,78**	**126,04**	**114,02**	**183,09**	**208,92**	**119,86**

Maximum **Minimum**

[Euro/MWh]

The week followed the classic pattern: higher weekday pricing, tempered by weekend lows. The overall average stood at **61,17 EUR/MWh**, with **67,22 EUR/MWh** during working days and just **46,02 EUR/MWh** over the weekend.

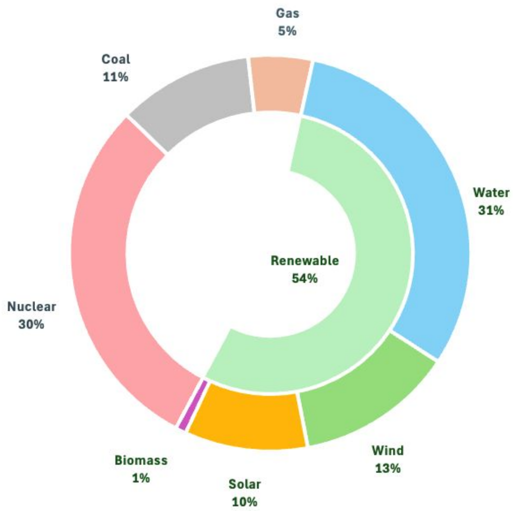


Compared to the prior week, price volatility rose, with the hourly spread widening from **almost 130 EUR/MWh** to **183,09 EUR/MWh**.

Energy Overview

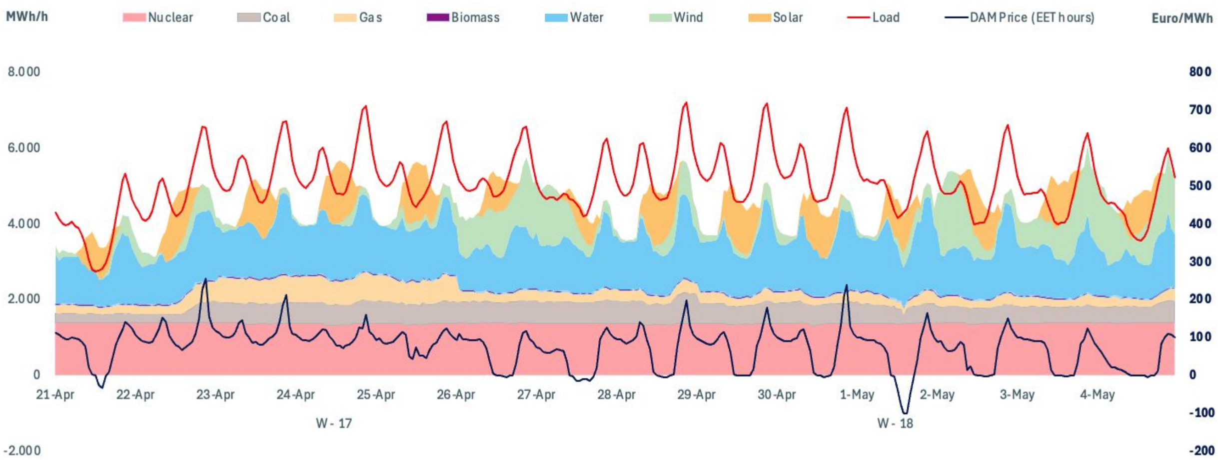
	Week 17	Week 18	Variation
	GWh	GWh	%
PRODUCTION	755	776	2,8%
Nuclear	230	229	-0,2%
Coal	81	85	4,7%
Gas	72	40	-43,7%
Water	230	239	4,1%
Wind	67	99	47,4%
Solar	69	77	11,3%
Biomass	7	7	1,7%
LOAD	846	864	2,2%
SOLD	-91	-88	2,7%
DAM Price (EET hours) [Euro/MWh]	84,28	61,19	-27,4%

EET Hours



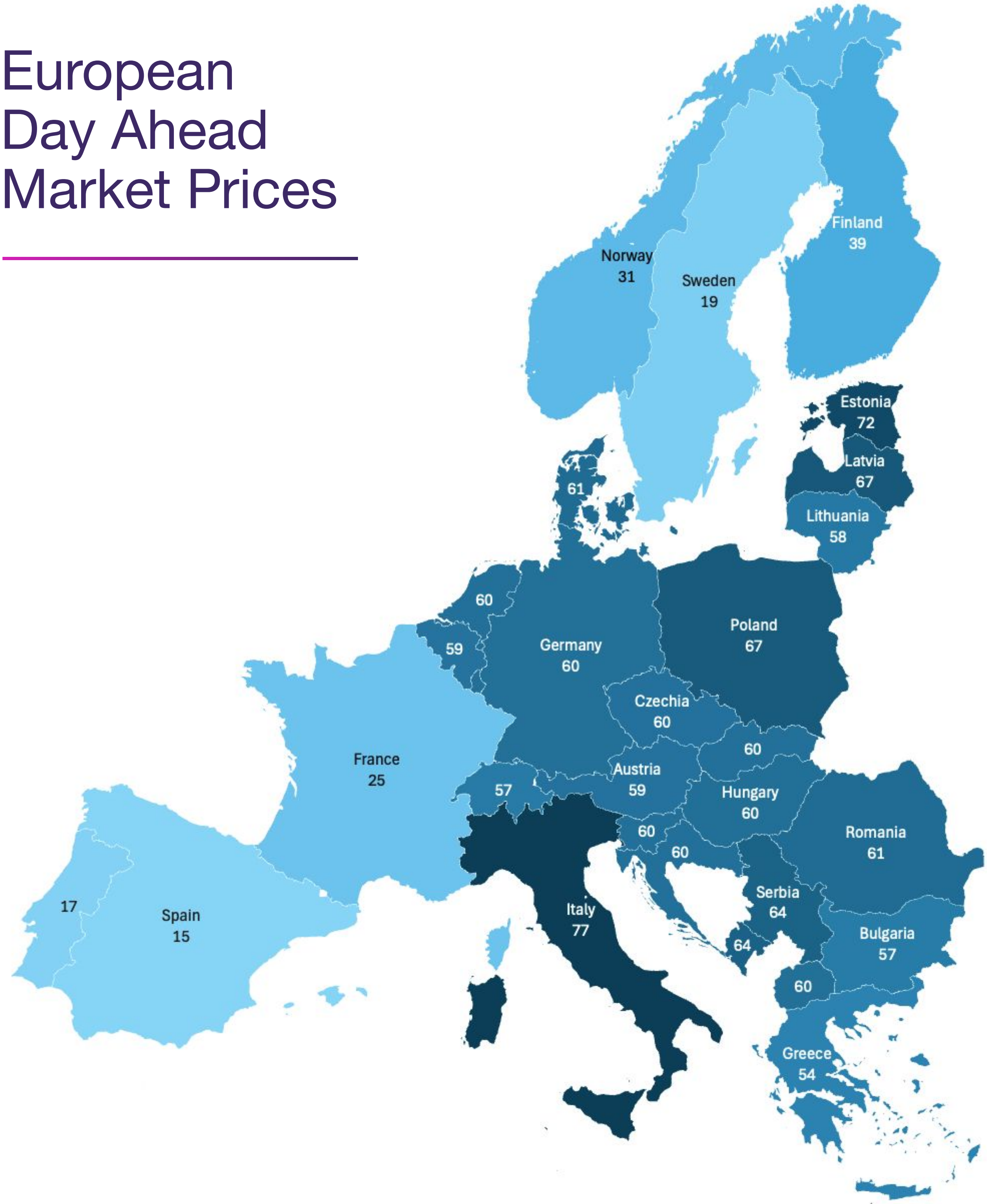
Romania's electricity output and consumption stayed near recent lows, edging up just slightly from last week. **Solar reached its highest weekly output**, while hydrocarbon-based production dropped to its lowest point in the period, marking **a shift in the energy mix toward renewables.**

Hourly Generation



Throughout the week, **the country maintained its position as a net electricity importer**, but conditions shifted over the weekend, driven by a significant increase in wind generation. As renewable output intensified and **exceeded domestic consumption**, **Romania temporarily reversed its energy balance**, turning from a net importer into a **regional exporter**.

European Day Ahead Market Prices



Across Europe, the week brought a notable decrease in average electricity prices, reaching **the lowest continental level of the past 12 months**, just **53,95 EUR/MWh**. The sharpest weekly decline came from **Finland**, where prices fell by 56 EUR/MWh after having reached a 7-month high the previous week.

Spain and Portugal continued to lead with the lowest prices in Europe, both staying below 20 EUR/MWh, while **Italy recorded the highest weekly average at 76,66 EUR/MWh**, despite it being its lowest in more than a year.

The combination of **low consumption** and **high renewable output** led to serious system instability in the Iberian Peninsula. On **April 28th**, a sudden drop in renewable production - which made up 80% of Spain's supply at that moment - caused a major imbalance, ultimately disconnecting the region from the European power grid.

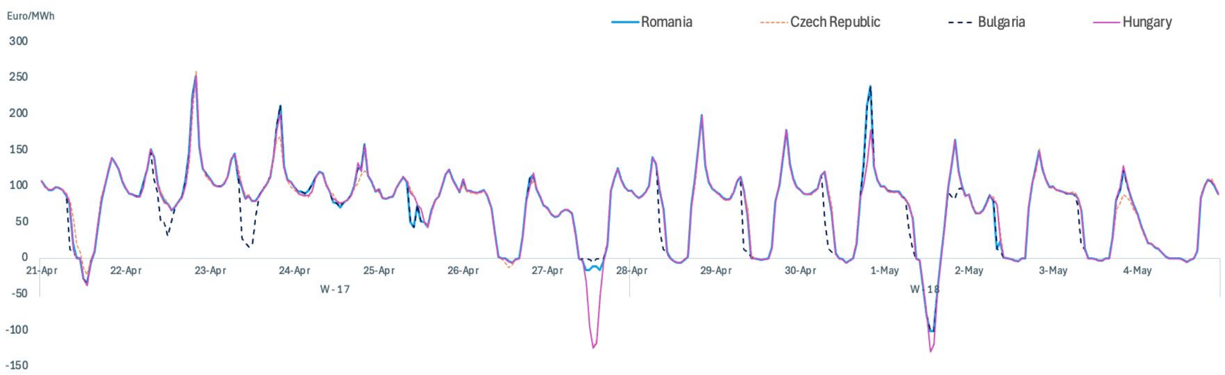
European Energy Context

DAM PRICES

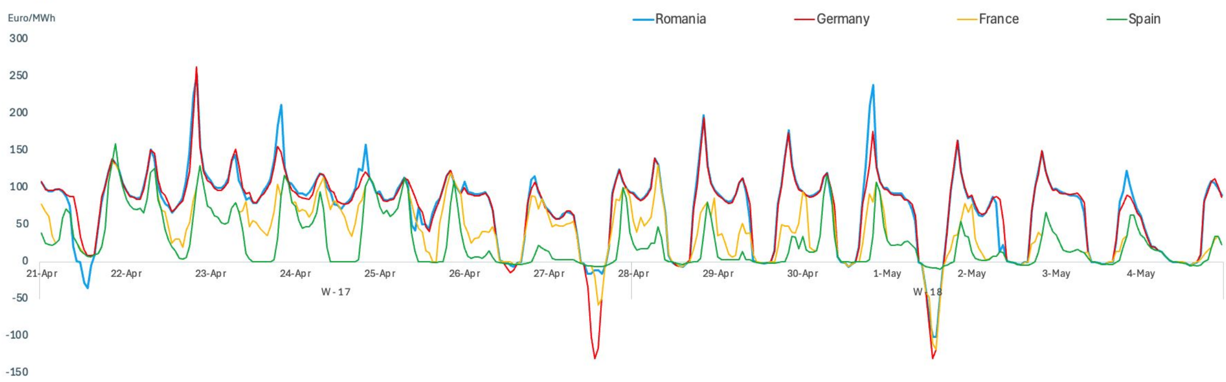
CET Hours

	Week 17 [Euro/MWh]	Week 18 [Euro/MWh]	Variation %
Romania	84,18	61,17	**-27,3%**
Bulgaria	81,46	56,72	**-30,4%**
Hungary	82,20	60,31	**-26,6%**
Czech Republic	81,88	59,77	**-27,0%**
Germany	82,61	60,04	**-27,3%**
France	58,67	25,19	**-57,1%**
Spain	37,63	15,36	**-59,2%**

Region



Europe



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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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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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