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WEEKLY ENERGY REPORT

21 / 2025

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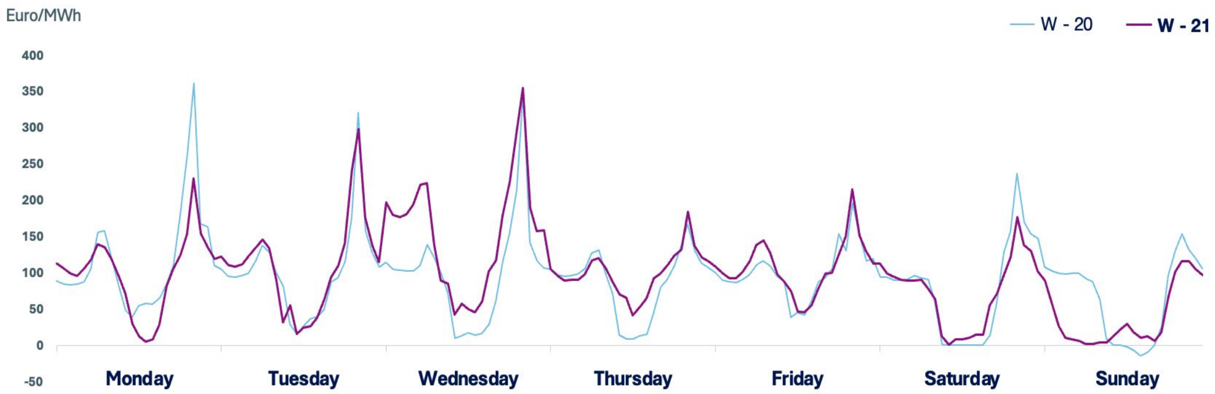
Day Ahead Market Price

DAM PRICES			CET Hours
	Week 20 [Euro/MWh]	**Week 21** [Euro/MWh]	**Variation** %
Average Price	**92,93**	**97,96**	**5,41%**
Maximum Price	**361,77**	**355,00**	**-1,87%**
Minimum Price	**-15,00**	**0,84**	**105,60%**
ΔPrice = max(average) - min(average)	**239,45**	**196,20**	**-18,06%**

Romania closed the week with an average price of 97,96 EUR/MWh, marking a 5,4% increase compared to the previous week. This positioned the country as the third most expensive market in Europe, behind only Serbia and Montenegro, and narrowly ahead of Bulgaria.

The **maximum hourly price decreased slightly to 355 EUR/MWh**, while the **minimum returned to positive territory**, reaching 0,84 EUR/MWh after the -15 EUR/MWh recorded the week before.

Hourly Prices



The 21 time slot continues to dominate the country's price profile. For the third consecutive week, it delivered the highest hourly value **355 EUR/MWh**, recorded this time on Wednesday, May 21st.

That hour also marked the weekly maximum across much of Eastern Europe. **Serbia posted the highest price overall**, at **399,98 EUR/MWh**, followed by similarly high values in Slovakia, Poland, Hungary, North Macedonia, Montenegro, Bulgaria, and Greece.

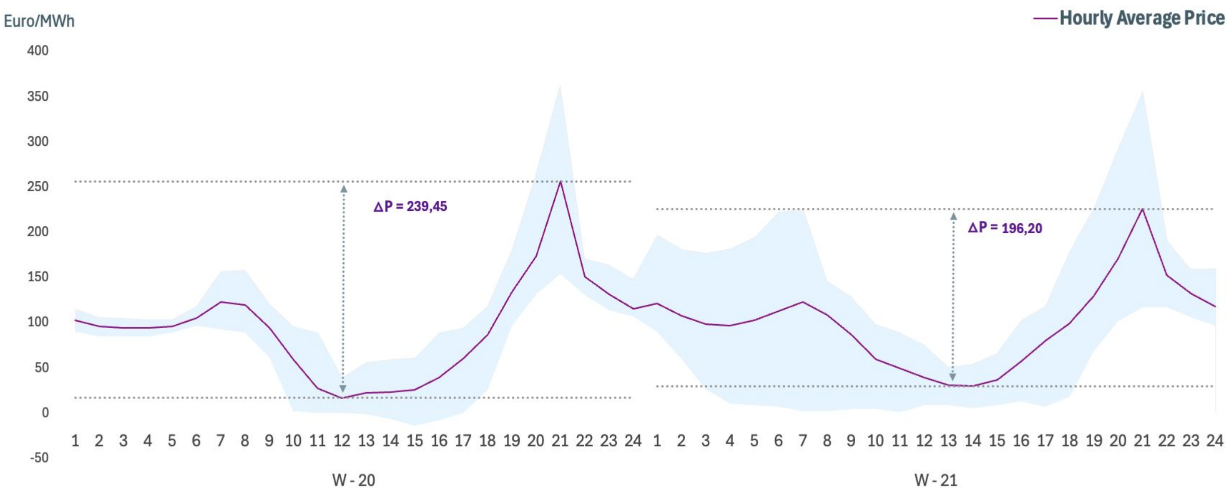
Prices Spread

Hour (CET)	Monday 19-May	Tuesday 20-May	Wednesday 21-May	Thursday 22-May	Friday 23-May	Saturday 24-May	Sunday 25-May	Average Price Week	Average Price Weekdays	Average Price Weekend
1	112,56	121,89	196,44	104,93	108,50	112,45	89,02	**120,83**	**128,86**	**100,74**
2	105,98	110,55	180,16	95,73	99,49	98,88	59,22	**107,14**	**118,38**	**79,05**
3	99,06	107,96	176,20	89,78	92,84	94,46	25,92	**98,03**	**113,17**	**60,19**
4	95,88	111,42	181,11	90,54	92,52	89,90	10,11	**95,93**	**114,29**	**50,01**
5	105,75	123,84	193,89	90,65	100,68	89,00	8,00	**101,69**	**122,96**	**48,50**
6	118,57	133,98	221,78	97,46	116,43	89,00	6,41	**111,95**	**137,64**	**47,71**
7	139,58	145,25	223,97	117,39	138,42	89,99	1,48	**122,30**	**152,92**	**45,74**
8	135,16	134,40	138,00	120,39	145,00	78,20	1,41	**107,51**	**134,59**	**39,81**
9	118,88	88,83	89,44	106,49	127,36	63,35	3,62	**85,42**	**106,20**	**33,49**
10	96,03	31,61	84,82	88,50	97,30	12,26	3,51	**59,15**	**79,65**	**7,89**
11	72,03	55,00	42,22	70,09	87,80	0,84	12,26	**48,61**	**65,43**	**6,55**
12	29,03	15,99	57,30	65,52	74,16	7,69	21,64	**38,76**	**48,40**	**14,67**
13	12,77	24,10	50,00	40,89	46,18	8,44	30,00	**30,34**	**34,79**	**19,22**
14	5,00	26,34	45,17	52,87	45,37	10,23	17,77	**28,96**	**34,95**	**14,00**
15	8,00	38,41	60,96	65,01	55,00	14,80	10,09	**36,04**	**45,48**	**12,45**
16	29,00	63,22	101,77	92,96	77,37	15,00	12,63	**55,99**	**72,86**	**13,82**
17	81,99	93,92	117,33	98,66	98,56	55,09	6,16	**78,82**	**98,09**	**30,63**
18	105,36	109,38	178,77	110,08	99,63	70,65	17,52	**98,77**	**120,64**	**44,09**
19	124,08	140,91	226,18	123,79	126,87	95,39	68,03	**129,32**	**148,37**	**81,71**
20	153,29	242,78	292,13	132,38	149,76	122,53	100,90	**170,54**	**194,07**	**111,72**
21	230,28	298,63	355,00	183,66	215,53	176,70	116,36	**225,17**	**256,62**	**146,53**
22	153,85	176,41	189,04	137,35	151,61	137,91	115,97	**151,73**	**161,65**	**126,94**
23	136,23	136,97	158,00	121,47	129,37	130,29	105,22	**131,08**	**136,41**	**117,76**
24	119,34	114,82	158,77	115,61	112,54	102,02	96,25	**117,05**	**124,22**	**99,14**
Average	**99,49**	**110,28**	**154,94**	**100,51**	**107,85**	**73,54**	**39,15**	**97,96**	**114,61**	**56,35**
ΔPrice	**225,28**	**282,64**	**312,78**	**142,77**	**170,16**	**175,86**	**114,95**	**196,20**	**221,83**	**139,98**

Maximum **Minimum**

[Euro/MWh]

Weekly average settled at **97,96 EUR/MWh, with the familiar weekday-weekend contrast clearly visible.** Weekdays averaged 114,61 EUR/MWh, nearly double the **56,35 EUR/MWh** recorded over the weekend.

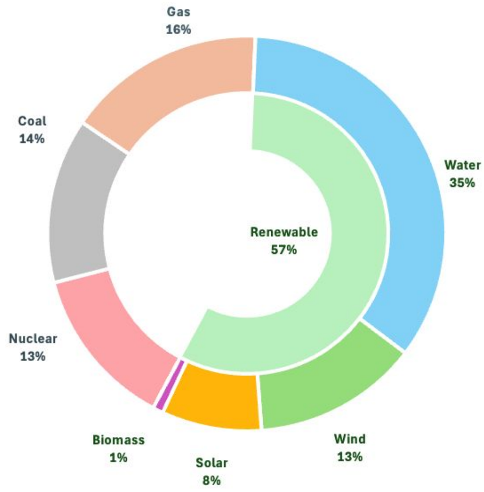


The weekly price spread narrowed to **196,20 EUR/MWh**, **down 18% from the previous week.** While the maximum hourly price saw only a slight decrease, the rebound in the minimum price, back above zero, reduced the overall range.

Energy Overview

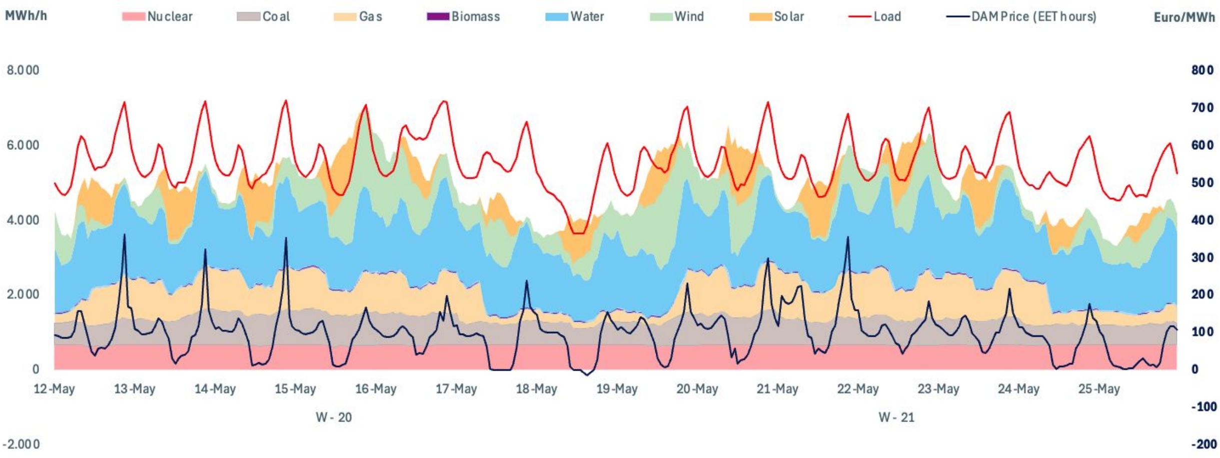
	Week 20	Week 21	Variation
	GWh	GWh	%
PRODUCTION	**825**	**837**	**1,5%**
Nuclear	111	111	-0,1%
Coal	123	113	-8,3%
Gas	125	136	8,6%
Water	284	290	2,0%
Wind	107	113	5,2%
Solar	67	68	1,0%
Biomass	7	7	4,3%
LOAD	**934**	**920**	**-1,4%**
SOLD	**-109**	**-83**	**23,8%**
DAM Price (EET hours) [Euro/MWh]	**92,85**	**98,02**	**5,6%**

EET Hours



Electricity consumption declined slightly, **and total generation rose by 1,5%** compared to the previous week. However, this wasn't enough to ease price pressure, **as the weekly average still climbed by 5,6%.**

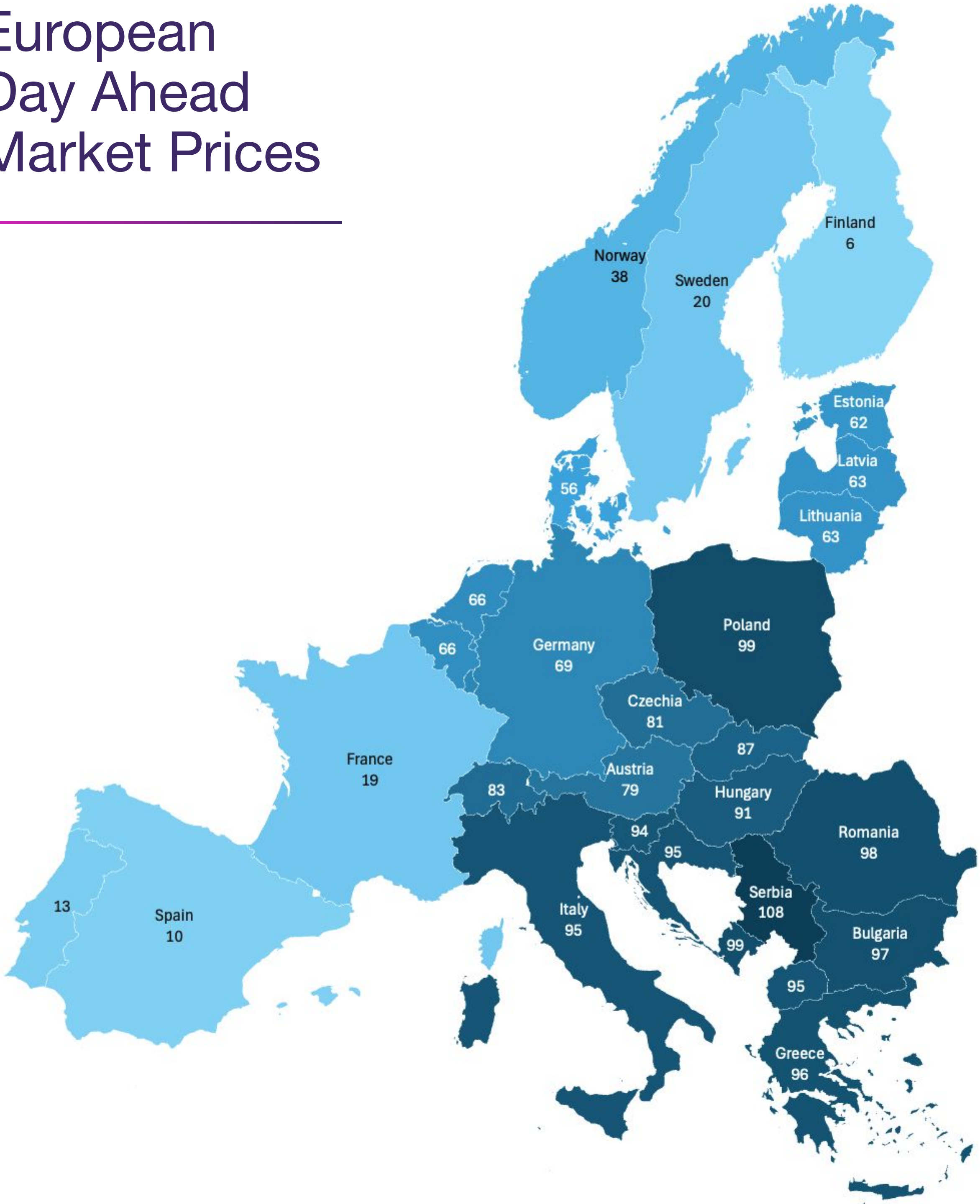
Hourly Generation



Renewables continued to strengthen their share in Romania's power mix, **reaching 57% of total electricity production, up three percentage from the previous week.**

This growth was largely supported by strong hydro and wind flows, with **Tuesday, May 20th** marking a **record-breaking day for solar production** in the country.

European Day Ahead Market Prices



The continental average stayed **under 70 EUR/MWh**, but the national trends pulled in opposite directions. **Finland (6,26 EUR/MWh)** and **Spain (9,8 EUR/MWh)** remained at the **bottom of the price range**, continuing their consistent downward paths. Declines were also seen in France, Italy, and across the Nordics and Baltics.

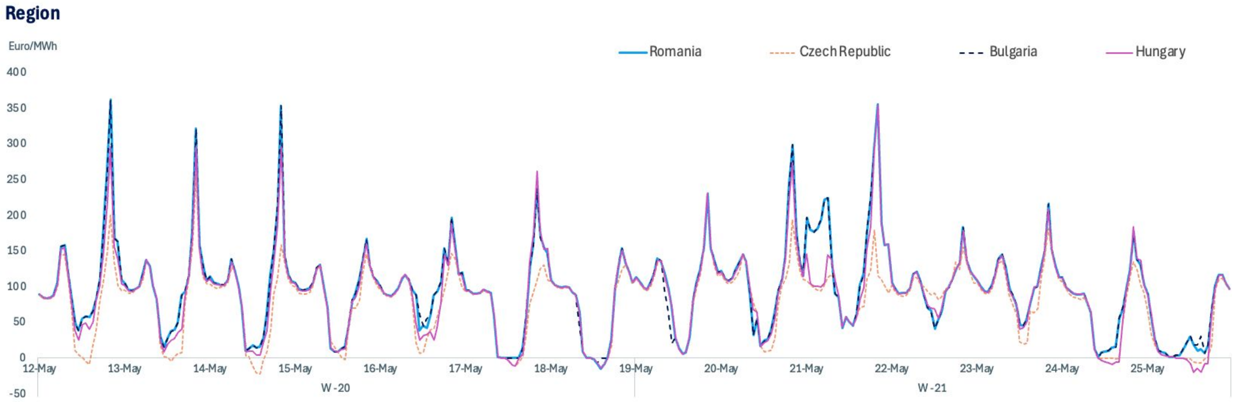
But elsewhere, the landscape looked different. **Serbia registered a 15% weekly increase**, becoming the **most expensive market in Europe**, with an average of **108,07 EUR/MWh**, the **only value to exceed the 100 threshold**. **Switzerland followed with a 22% increase**, the highest weekly rise on the map.

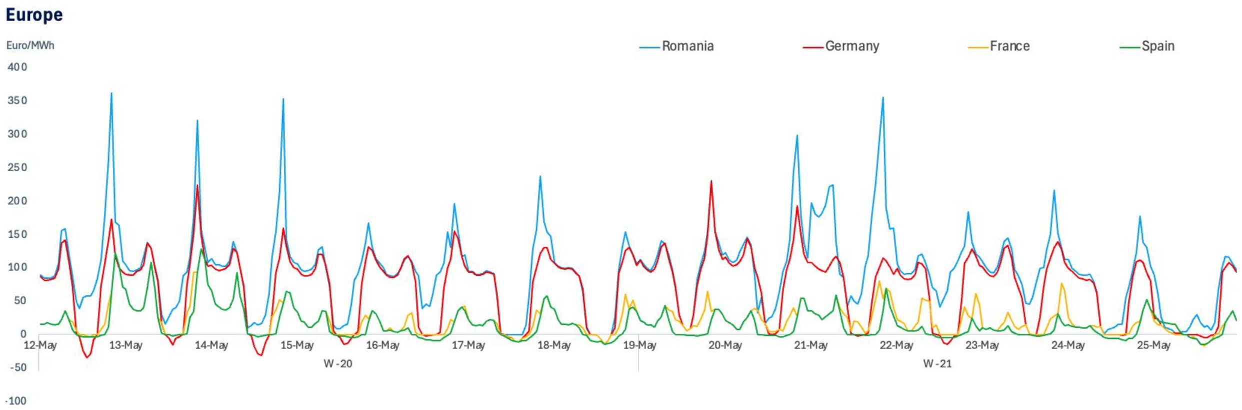
European Energy Context

DAM PRICES

CET Hours

	Week 20 [Euro/MWh]	Week 21 [Euro/MWh]	Variation %
Romania	92,93	97,96	**5,4%**
Bulgaria	93,17	97,48	**4,6%**
Hungary	87,00	91,17	**4,8%**
Czech Republic	74,02	81,47	**10,1%**
Germany	68,61	69,09	**0,7%**
France	23,10	19,27	**-16,6%**
Spain	18,19	9,80	**-46,2%**





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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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