

wiren

WEEKLY ENERGY REPORT

22 / 2025

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Day Ahead Market Price

DAM PRICES

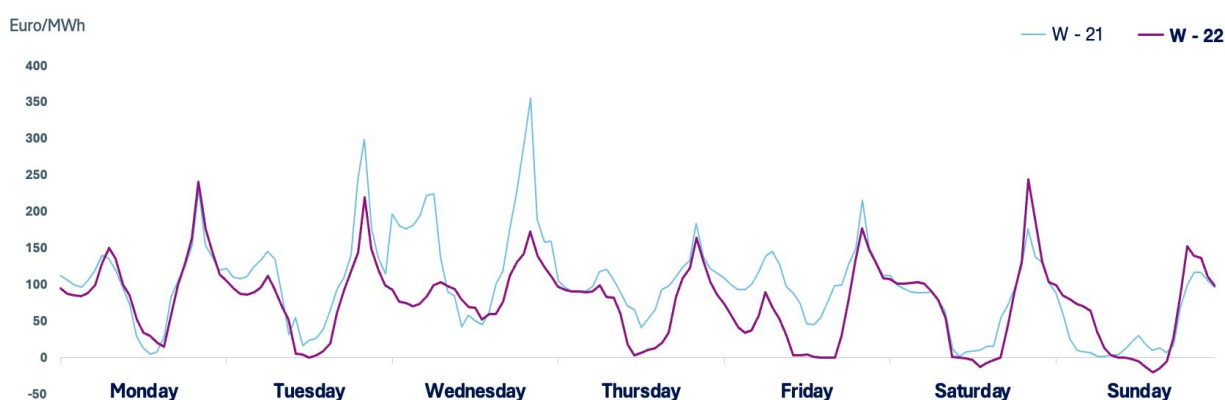
CET Hours

	Week 21 [Euro/MWh]	Week 22 [Euro/MWh]	Variation %
Average Price	97,96	75,44	-23,00%
Maximum Price	355,00	244,16	-31,22%
Minimum Price	0,84	-20,41	-2.529,76%
$\Delta\text{Price} = \max(\text{average}) - \min(\text{average})$	196,20	183,72	-6,36%

Romania's average price dropped by 23%, reaching **75,44 EUR/MWh**, yet it remained one of the highest in Europe. The country ranked fourth, just behind Poland, Italy, and Montenegro, and just ahead of Bulgaria by less than 1 EUR/MWh.

The hourly highs and lows shifted: The maximum fell to **244,16 EUR/MWh (-31%)**, and the minimum went below zero again, reaching **-20,41 EUR/MWh**. With both ends of the curve shifting down, the weekly spread narrowed by 6,36%.

Hourly Prices



Romania's highest hourly price was recorded during the 21 time slot on **Saturday, May 31st, reaching 244,16 EUR/MWh**. The same value was logged in Bulgaria, while Hungary (248,38 EUR/MWh) and Croatia (244,03 EUR/MWh) also hit their weekly highs during that hour.

The weekly low followed a day later, on **Sunday at 15**, when Romania and 12 other countries traded electricity on the day-ahead market at **-20,41 EUR/MWh**.



Prices Spread

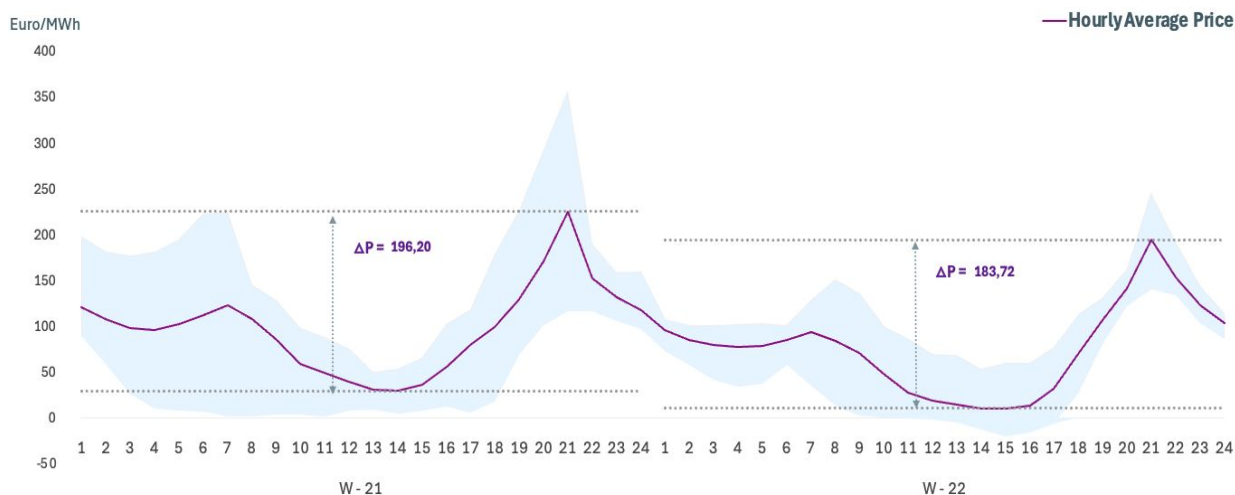
Hour (CET)	Monday 26-May	Tuesday 27-May	Wednesday 28-May	Thursday 29-May	Friday 30-May	Saturday 31-May	Sunday 1-Jun	Average Price Week	Average Price Weekdays	Average Price Weekend
1	95,00	105,78	92,02	96,74	73,19	107,00	98,69	95,49	92,55	102,85
2	87,63	94,11	76,94	92,31	57,81	101,02	85,15	85,00	81,76	93,09
3	84,68	87,61	74,10	90,42	41,35	100,62	79,58	79,77	75,63	90,10
4	83,54	85,92	69,60	89,99	33,95	101,67	72,89	76,79	72,60	87,28
5	88,41	89,02	73,30	89,78	37,39	102,70	69,74	78,62	75,58	86,22
6	98,55	95,86	84,18	90,25	57,25	100,67	63,38	84,31	85,22	82,03
7	127,20	111,66	98,79	98,77	89,02	90,05	34,87	92,91	105,09	62,46
8	150,04	94,02	102,78	82,37	68,38	78,70	13,00	84,18	99,52	45,85
9	135,45	70,23	98,16	81,87	53,01	54,32	2,40	70,78	87,74	28,36
10	99,69	51,98	93,74	60,83	29,13	1,00	-0,01	48,05	67,07	0,50
11	85,06	4,51	80,18	18,00	2,94	-0,02	-0,60	27,15	38,14	-0,31
12	51,51	3,43	69,15	2,94	2,94	-1,00	-2,11	18,12	25,99	-1,56
13	33,87	0,20	67,91	5,61	4,02	-3,07	-5,48	14,72	22,32	-4,28
14	30,00	2,94	52,27	10,53	0,77	-13,17	-12,93	10,06	19,30	-13,05
15	19,83	8,43	58,90	12,05	0,04	-7,75	-20,41	10,16	19,85	-14,08
16	15,01	18,82	59,56	19,75	0,12	-3,00	-15,61	13,52	22,65	-9,31
17	59,46	61,00	76,13	33,63	0,14	0,03	-6,00	32,06	46,07	-2,99
18	98,84	92,00	112,05	82,45	29,20	43,43	26,10	69,15	82,91	34,77
19	129,69	117,20	130,90	108,53	80,72	88,82	88,36	106,32	113,41	88,59
20	162,66	143,95	141,38	122,10	132,52	131,34	151,93	140,84	140,52	141,64
21	240,25	218,84	172,95	164,00	176,49	244,16	139,79	193,78	194,51	191,98
22	175,15	148,57	138,98	133,35	146,56	191,07	135,99	152,81	148,52	163,53
23	144,21	118,86	124,41	102,68	130,19	131,15	110,54	123,15	124,07	120,85
24	113,87	99,37	110,83	85,68	108,27	103,19	97,81	102,72	103,60	100,50
Average	100,40	80,18	94,13	73,94	56,48	72,62	50,29	75,44	81,03	61,46
ΔPrice	225,24	218,64	120,68	161,06	176,45	257,33	172,34	183,72	175,20	206,06

Maximum

Minimum

[Euro/MWh]

With weekdays still carrying the load, Romania's price curve leaned familiar, but lower. Weekday prices averaged **81,03 EUR/MWh**, a drop from the **114,61 EUR/MWh** seen the week before, and the **weekend decreased to 61,46 EUR/MWh**.

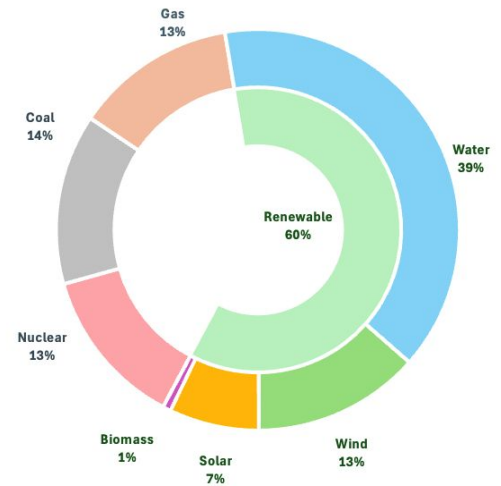


With prices settling at lower levels, the weekly spread went down by **12,48 EUR/MWh**, easing to **183,72 EUR/MWh**.



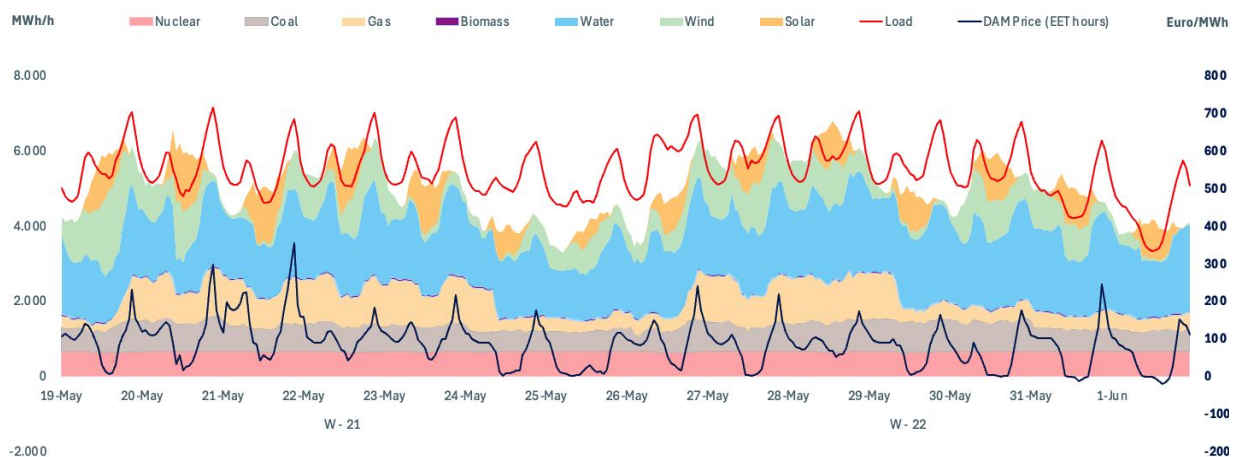
Energy Overview

	EET Hours		
	Week 21 GWh	Week 22 GWh	Variation %
PRODUCTION	837	863	3,1%
Nuclear	111	111	0,4%
Coal	113	119	5,0%
Gas	136	112	-17,4%
Water	290	338	16,4%
Wind	113	116	2,8%
Solar	68	62	-8,4%
Biomass	7	6	-20,8%
LOAD	920	921	0,1%
SOLD	-83	-58	30,2%
DAM Price (EET hours) [Euro/MWh]	98,02	75,43	-23,1%



Electricity demand held steady last week, but **generation stepped up, increasing by 3,1%** thanks to improved hydrological conditions. The boost came right when it was needed, marking a strong start to June for local production.

Hourly Generation



Hydropower increased by 16,4%, making up for the drop in fossil-based output and making **renewables dominate the mix with a 60% share of total national generation**. Clean sources kept the grid balanced - and greener - throughout the week.



European Day Ahead Market Prices



In the last week of May, the European average was **61 EUR/MWh**, as most countries registered lower weekly prices.

The sharpest declines came from the east: **Greece** and **Serbia** prices lowered by over **30%**, followed by **Romania**, **Bulgaria**, **Slovenia**, **Croatia** and **North Macedonia**, with decreases between **22 and 25%**. On the other side, **Spain** and **Portugal** tripled their average prices, while **France** and **Finland** posted increases of **45%** and **25%**. Despite the high variation, all four remained under **40 EUR/MWh**.

Poland recorded both the **highest weekly average (99 EUR/MWh)** and the **highest hourly price (315,22 EUR/MWh)**, matching highs in **Austria**, **Czechia**, **Switzerland**, **Greece** and **Slovakia**. In annual terms, **Spain**, **Portugal**, and **France** recorded the most significant increases, all above **60%**, while the **Baltics** posted the biggest drops, with declines exceeding **40%**.



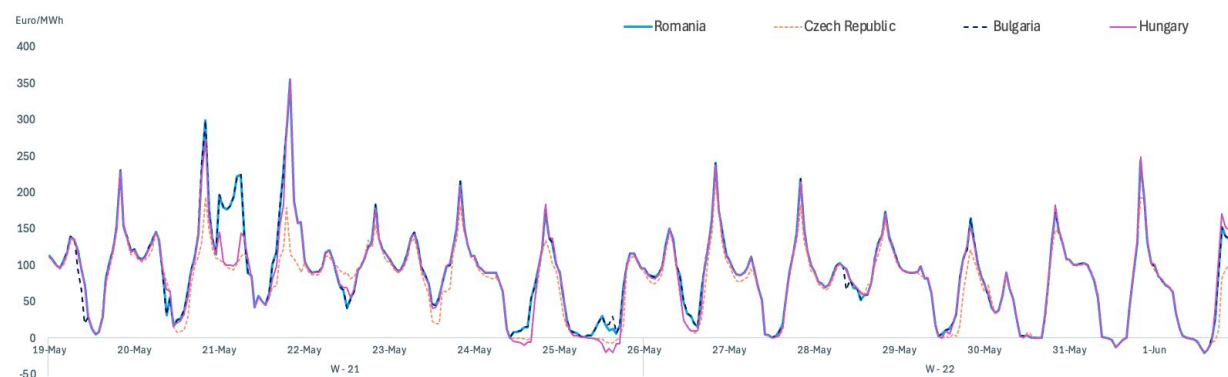
European Energy Context

DAM PRICES

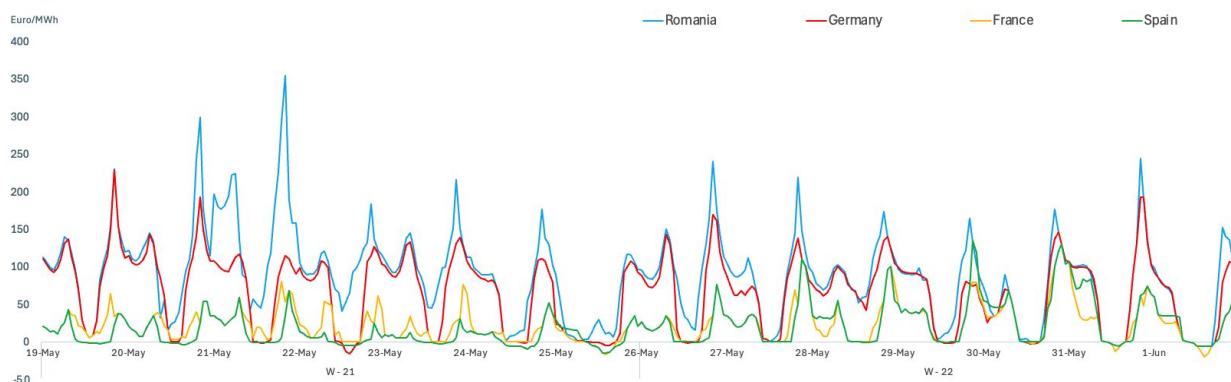
CET Hours

	Week 21 [Euro/MWh]	Week 22 [Euro/MWh]	Variation %
Romania	97,96	75,44	-23,0%
Bulgaria	97,48	75,31	-22,7%
Hungary	91,17	74,89	-17,9%
Czech Republic	81,47	67,87	-16,7%
Germany	69,09	61,93	-10,4%
France	19,27	28,00	45,3%
Spain	9,80	30,07	207,0%

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

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.