

wiren

# WEEKLY ENERGY REPORT

29 / 2025

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# Day Ahead Market Price

## DAM PRICES

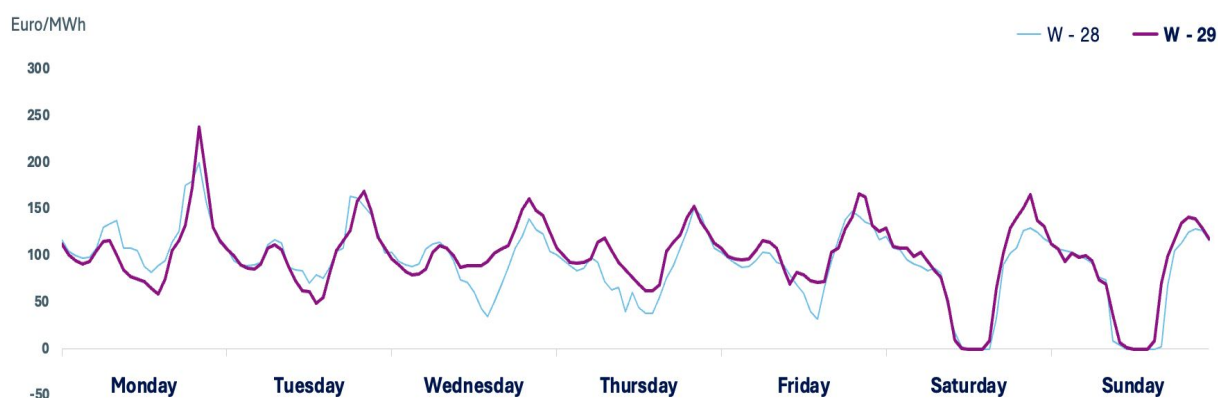
CET Hours

|                                                                    | Week 28<br>[Euro/MWh] | Week 29<br>[Euro/MWh] | Variation<br>% |
|--------------------------------------------------------------------|-----------------------|-----------------------|----------------|
| Average Price                                                      | 92,30                 | 98,29                 | 6,49%          |
| Maximum Price                                                      | 200,03                | 238,17                | 19,07%         |
| Minimum Price                                                      | 0,00                  | -0,01                 | -              |
| $\Delta\text{Price} = \max(\text{average}) - \min(\text{average})$ | 109,79                | 120,20                | 9,49%          |

Electricity prices in **Romania** ticked up slightly last week - **up 6%** from the previous one - bringing the national average to **€98,29/MWh**. That's enough to keep **Romania in the top 7 most expensive energy markets** in Europe, right next to **Hungary**.

Zooming out, a **year-on-year comparison** shows a bigger shift: **Romania's prices are nearly 50% lower** than the same week in 2024. **Estonia, Bulgaria**, and the **Baltics** saw similar drops, while **Switzerland** went in the opposite direction, **doubling its average price**.

## Hourly Prices



The **highest hourly price of the week** was recorded when **demand was at its highest**: on **Monday evening at 9PM**. The **hourly price reached €238,17/MWh**, reflecting a pattern seen across much of **Central and Eastern Europe**, where **nine other countries** also recorded their **weekly highs** at the same time. **Poland led the way**, reaching **€296,45/MWh**.

At the other end of the curve, **weekend calm brought short dips into the negative zone**. Romania logged a **minimum hourly price of -€0,01/MWh**, but only for two brief intervals.



# Prices Spread

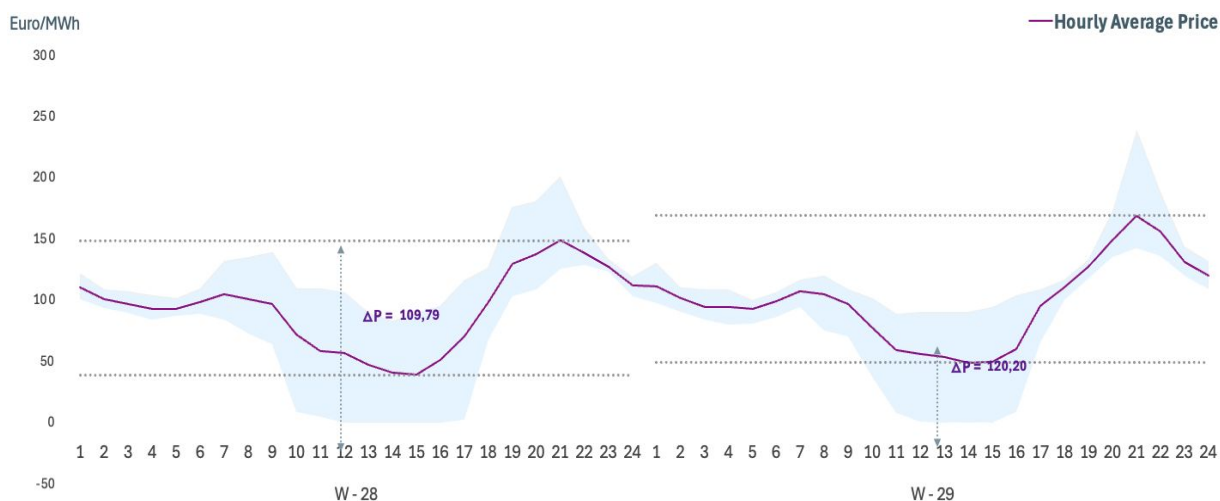
| Hour (CET) | Monday 14-Jul | Tuesday 15-Jul | Wednesday 16-Jul | Thursday 17-Jul | Friday 18-Jul | Saturday 19-Jul | Sunday 20-Jul | Average Price Week | Average Price Weekdays | Average Price Weekend |
|------------|---------------|----------------|------------------|-----------------|---------------|-----------------|---------------|--------------------|------------------------|-----------------------|
| 1          | 113,03        | 107,11         | 97,00            | 108,27          | 108,28        | 129,87          | 112,77        | 110,90             | 106,74                 | 121,32                |
| 2          | 101,60        | 100,14         | 90,48            | 101,16          | 99,67         | 110,12          | 107,19        | 101,48             | 98,61                  | 108,66                |
| 3          | 94,79         | 90,57          | 83,51            | 92,75           | 96,61         | 108,43          | 93,70         | 94,34              | 91,65                  | 101,07                |
| 4          | 90,93         | 86,75          | 79,90            | 91,98           | 95,59         | 108,43          | 103,20        | 93,83              | 89,03                  | 105,82                |
| 5          | 93,59         | 85,59          | 80,29            | 92,80           | 96,58         | 99,48           | 98,57         | 92,41              | 89,77                  | 99,03                 |
| 6          | 105,60        | 91,75          | 86,05            | 96,85           | 105,87        | 103,92          | 100,28        | 98,62              | 97,22                  | 102,10                |
| 7          | 115,83        | 108,25         | 104,11           | 114,96          | 116,22        | 94,32           | 94,59         | 106,90             | 111,87                 | 94,46                 |
| 8          | 116,02        | 111,57         | 110,82           | 119,55          | 115,09        | 84,05           | 74,59         | 104,53             | 114,61                 | 79,32                 |
| 9          | 101,26        | 106,16         | 108,28           | 105,92          | 108,43        | 76,65           | 70,17         | 96,70              | 106,01                 | 73,41                 |
| 10         | 85,33         | 89,09          | 100,67           | 93,10           | 87,25         | 51,11           | 37,01         | 77,65              | 91,09                  | 44,06                 |
| 11         | 77,98         | 73,20          | 88,13            | 85,00           | 70,27         | 10,00           | 7,45          | 58,86              | 78,92                  | 8,73                  |
| 12         | 75,54         | 62,62          | 89,36            | 77,07           | 81,99         | 0,65            | 1,93          | 55,59              | 77,32                  | 1,29                  |
| 13         | 72,82         | 61,45          | 89,85            | 70,17           | 80,00         | 0,00            | 0,00          | 53,47              | 74,86                  | 0,00                  |
| 14         | 65,74         | 49,45          | 89,37            | 63,00           | 73,02         | -0,01           | -0,01         | 48,65              | 68,12                  | -0,01                 |
| 15         | 58,76         | 55,78          | 93,99            | 63,00           | 71,20         | 0,00            | 0,00          | 48,96              | 68,55                  | 0,00                  |
| 16         | 75,36         | 83,02          | 103,35           | 68,99           | 72,68         | 8,58            | 8,43          | 60,06              | 80,68                  | 8,51                  |
| 17         | 105,80        | 105,75         | 107,87           | 104,37          | 104,26        | 65,28           | 70,81         | 94,88              | 105,61                 | 68,05                 |
| 18         | 116,02        | 116,53         | 111,23           | 115,00          | 108,79        | 102,80          | 99,58         | 109,99             | 113,51                 | 101,19                |
| 19         | 132,81        | 127,60         | 128,59           | 123,04          | 129,00        | 130,00          | 117,72        | 126,97             | 128,21                 | 123,86                |
| 20         | 172,57        | 158,15         | 150,00           | 141,33          | 141,86        | 140,74          | 134,98        | 148,52             | 152,78                 | 137,86                |
| 21         | 238,17        | 169,26         | 161,12           | 153,49          | 166,84        | 151,25          | 141,86        | 168,86             | 177,78                 | 146,56                |
| 22         | 186,71        | 148,44         | 148,46           | 135,81          | 163,35        | 165,66          | 140,00        | 155,49             | 156,55                 | 152,83                |
| 23         | 130,45        | 119,88         | 143,72           | 125,07          | 132,25        | 138,01          | 130,23        | 131,37             | 130,27                 | 134,12                |
| 24         | 116,56        | 108,25         | 125,00           | 114,18          | 126,24        | 131,40          | 118,63        | 120,04             | 118,05                 | 125,02                |
| Average    | 110,14        | 100,68         | 107,13           | 102,37          | 106,31        | 83,78           | 77,65         | 98,29              | 105,32                 | 80,72                 |
| ΔPrice     | 179,41        | 119,81         | 81,22            | 90,49           | 96,57         | 165,67          | 141,87        | 120,20             | 109,66                 | 152,84                |

Maximum

Minimum

[Euro/MWh]

Energy prices were higher on **weekdays (€105,32/MWh)** and softened over the **weekend (€80,72/MWh)**, bringing the weekly average - as mentioned - to €98,29/MWh.

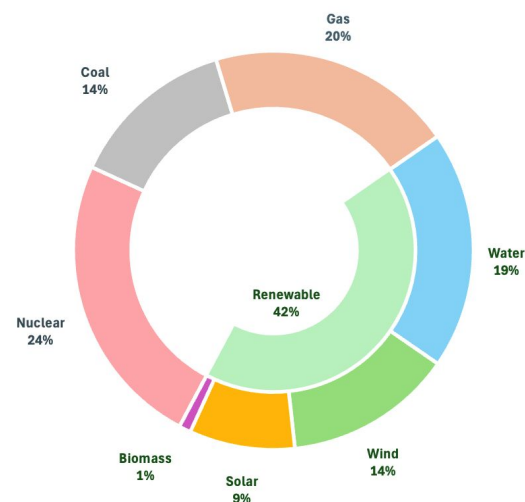


A wider spread defined last week's hourly prices - **€120,20 from peak to trough**, up from **€109,79** in the previous week.



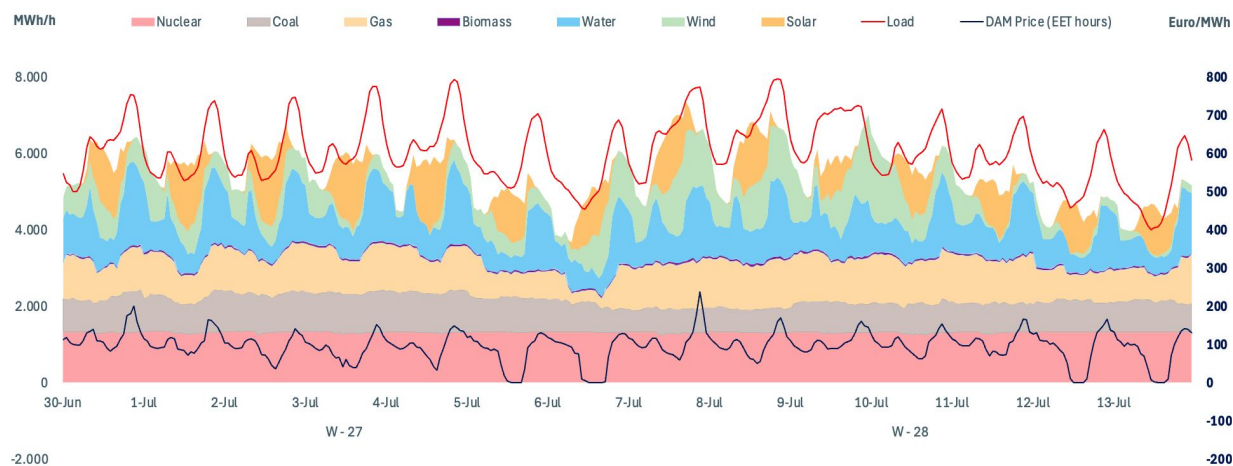
# Energy Overview

|                                         | EET Hours    |              |               |
|-----------------------------------------|--------------|--------------|---------------|
|                                         | Week28       | Week29       | Variation     |
|                                         | GWh          | GWh          | %             |
| <b>PRODUCTION</b>                       | <b>924</b>   | <b>917</b>   | <b>-0,7%</b>  |
| Nuclear                                 | 221          | 221          | -0,2%         |
| Coal                                    | 158          | 124          | -21,6%        |
| Gas                                     | 158          | 183          | 15,9%         |
| Water                                   | 185          | 177          | -4,0%         |
| Wind                                    | 94           | 125          | 32,6%         |
| Solar                                   | 100          | 78           | -21,5%        |
| Biomass                                 | 8            | 9            | 6,7%          |
| <b>LOAD</b>                             | <b>1.013</b> | <b>1.017</b> | <b>0,4%</b>   |
| <b>SOLD</b>                             | <b>-89</b>   | <b>-100</b>  | <b>-12,2%</b> |
| <b>DAM Price (EET hours) [Euro/MWh]</b> | <b>92,28</b> | <b>98,28</b> | <b>6,5%</b>   |



Both electricity **consumption and production edged down**, with the drop in generation mainly driven by lower output from coal and solar.

## Hourly Generation



**Thursday, July 17** marked a significant imbalance in Romania's energy system - the largest in the last five months. On that day, domestic production fell notably short of national demand, and **nearly 25% of the country's electricity consumption had to be covered through imports.**



# European Day Ahead Market Prices



After a week of price drops across most European energy markets, the last one brought a shift in direction. **Average prices rose in nearly all regions**, with only a few exceptions - **Finland, Estonia, Poland, and Belgium** saw slight decreases.

**France** registered the **biggest increase**, with weekly prices up by **22%**. **Montenegro** stayed on top as the **most expensive market**, following an **8% rise**, while **Italy** moved ahead of Poland, reaching **€118/MWh** and taking **second place**. **Finland** recorded the **lowest average price across Europe** - just **€18/MWh**, following a 44% decline.



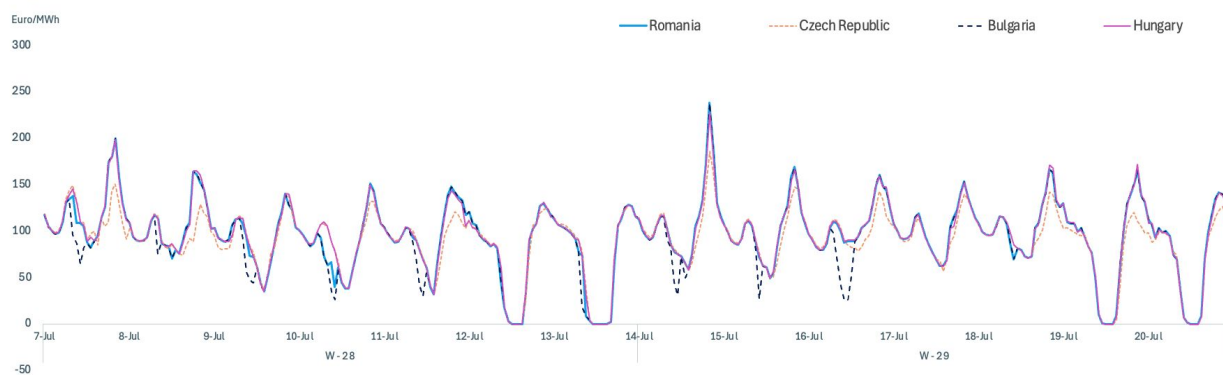
# European Energy Context

## DAM PRICES

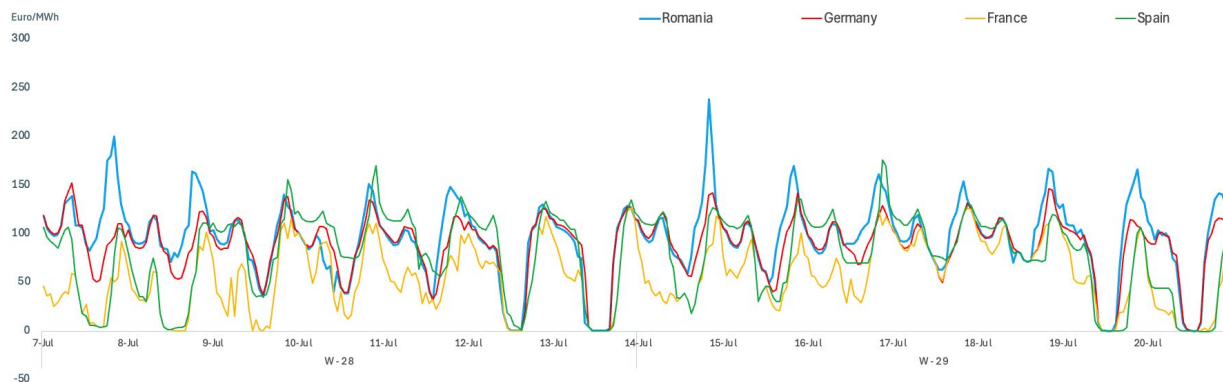
CET Hours

|                | Week 28<br>[Euro/MWh] | Week 29<br>[Euro/MWh] | Variation<br>% |
|----------------|-----------------------|-----------------------|----------------|
| Romania        | 92,30                 | 98,29                 | 6,5%           |
| Bulgaria       | 89,41                 | 95,71                 | 7,0%           |
| Hungary        | 93,74                 | 98,29                 | 4,9%           |
| Czech Republic | 89,49                 | 92,01                 | 2,8%           |
| Germany        | 86,55                 | 88,60                 | 2,4%           |
| France         | 49,96                 | 60,89                 | 21,9%          |
| Spain          | 77,28                 | 77,80                 | 0,7%           |

### 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.

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## Disclaimer

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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.