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WEEKLY ENERGY REPORT

31 / 2025

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Day Ahead Market Price

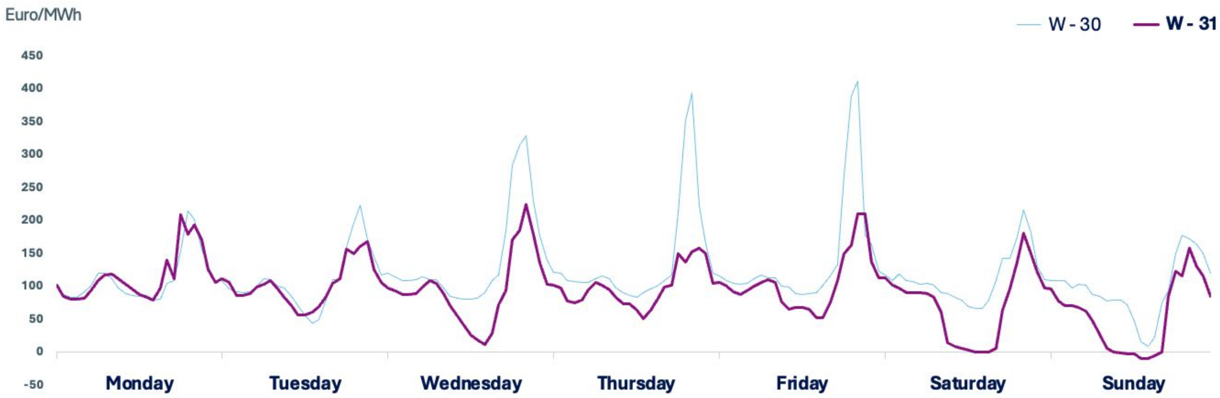
DAM PRICES	Week 30 [Euro/MWh]	Week 31 [Euro/MWh]	Variation %
Average Price	121,31	91,13	-24,88%
Maximum Price	410,50	223,94	-45,45%
Minimum Price	8,85	-10,08	-214%
∆Price = max(average) - min(average)	209,99	144,65	-31,12%

CET Hours

A slight downward shift was recorded last week on Romania's day-ahead market, with the average price easing from earlier values and settling at **91,13 €/MWh** - a **24,88% decrease** from the previous week's **121,31 €/MWh.**

As a result, it moved to the **sixth position** among the most expensive electricity markets in Europe, ranking behind **Italy, Montenegro, Poland, Bulgaria, and North Macedonia.** Even so, the difference separating Romania from countries like **Greece, Serbia, and Hungary** remained narrow, **less than 5 €/MWh.**

Hourly Prices



The weekly maximum reached **224 €/MWh** during **hour 20 on Wednesday, July 30**, just shy of the **225 €/MWh** recorded in **Slovenia.** This marked Romania's highest hourly price of the week, aligning with **seven other neighboring countries** setting their own weekly highs.

On **Sunday, August 3**, the country also **recorded** its **weekly minimum** of **-10 €/MWh** during **hour 15**, coinciding with similar **declines** in prices across **half of Europe's power exchanges.** The **lowest European price** for the week, **-11 €/MWh**, was **registered** in **Czechia** during **hour 18** of the same day.

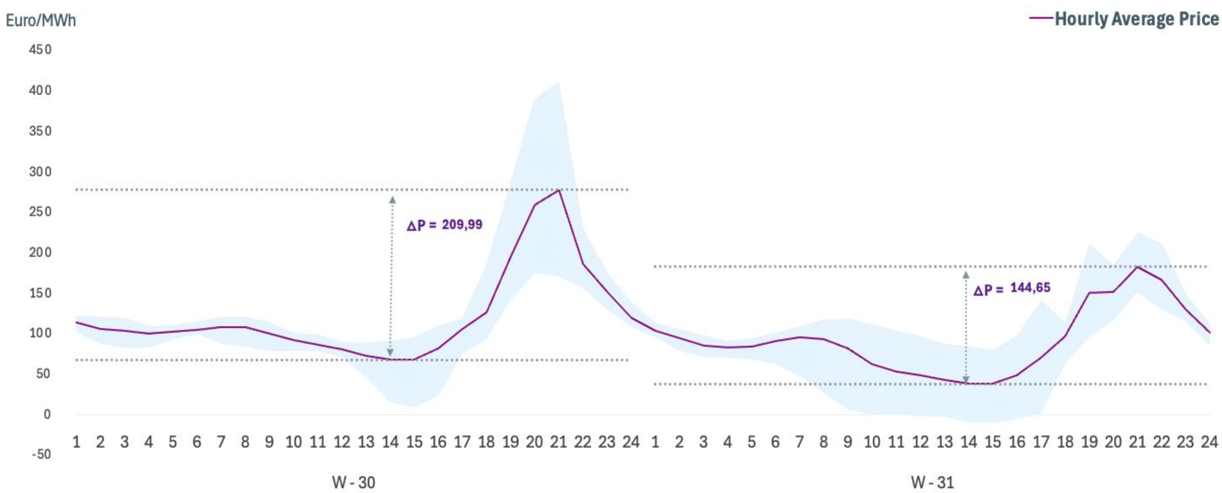
Prices Spread

Hour (CET)	Monday 28-Jul	Tuesday 29-Jul	Wednesday 30-Jul	Thursday 31-Jul	Friday 1-Aug	Saturday 2-Aug	Sunday 3-Aug	Average Price Week	Average Price Weekdays	Average Price Weekend
1	101,76	111,67	97,09	101,31	105,80	112,90	95,14	**103,67**	**103,53**	**104,02**
2	84,87	105,10	93,01	96,47	99,26	101,13	78,06	**93,99**	**95,74**	**89,60**
3	80,71	86,33	87,09	77,91	91,62	96,78	70,94	**84,48**	**84,73**	**83,86**
4	80,91	85,80	86,66	74,67	87,87	90,60	69,73	**82,32**	**83,18**	**80,17**
5	81,87	88,38	88,89	78,26	93,38	89,73	67,57	**84,01**	**86,16**	**78,65**
6	92,94	98,99	99,03	93,70	100,50	89,38	61,70	**90,89**	**97,03**	**75,54**
7	108,46	103,29	108,47	104,89	105,82	87,99	47,70	**95,23**	**106,19**	**67,85**
8	116,42	108,46	104,61	101,29	109,48	83,26	26,23	**92,82**	**108,05**	**54,75**
9	117,62	95,16	88,88	93,86	105,61	60,23	6,16	**81,07**	**100,23**	**33,20**
10	110,76	83,64	69,76	83,43	75,82	13,62	0,00	**62,43**	**84,68**	**6,81**
11	103,07	70,68	54,44	73,26	65,28	8,43	-1,01	**53,45**	**73,35**	**3,71**
12	95,67	57,00	40,46	72,99	66,94	5,68	-2,10	**48,09**	**66,61**	**1,79**
13	86,99	56,16	24,79	63,22	68,10	2,95	-3,00	**42,74**	**59,85**	**-0,02**
14	83,69	60,00	17,69	50,29	64,96	0,00	-9,90	**38,10**	**55,33**	**-4,95**
15	79,18	68,66	10,70	63,03	51,44	0,00	-10,08	**37,56**	**54,60**	**-5,04**
16	97,15	85,00	28,38	79,10	52,02	0,00	-4,98	**48,10**	**68,33**	**-2,49**
17	140,01	104,00	71,59	98,46	74,29	5,61	0,00	**70,57**	**97,67**	**2,81**
18	111,56	111,61	92,70	101,56	108,50	63,73	84,00	**96,24**	**105,19**	**73,87**
19	208,98	155,90	170,36	148,77	148,71	95,54	123,08	**150,19**	**166,54**	**109,31**
20	178,72	148,89	183,77	136,61	161,91	136,42	115,44	**151,68**	**161,98**	**125,93**
21	192,99	159,85	223,94	151,92	209,35	180,00	157,40	**182,21**	**187,61**	**168,70**
22	169,60	167,63	178,39	157,46	209,87	149,71	130,10	**166,11**	**176,59**	**139,91**
23	124,60	125,00	135,33	148,77	136,83	121,03	114,94	**129,50**	**134,11**	**117,99**
24	105,10	105,20	102,97	103,88	112,34	96,53	85,09	**101,59**	**105,90**	**90,81**
Average	**114,73**	**101,77**	**94,13**	**98,13**	**104,40**	**70,47**	**54,26**	**91,13**	**102,63**	**62,36**
ΔPrice	**129,80**	**111,47**	**213,24**	**107,17**	**158,43**	**180,00**	**167,48**	**144,65**	**133,01**	**173,74**

Maximum | Minimum

[Euro/MWh]

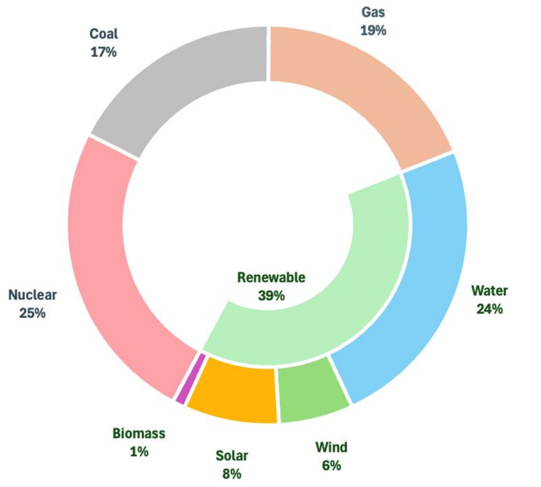
As mentioned earlier, the weekly average settled at **91,13 €/MWh.** Breaking it down further, the **weekday average** rose to **102,63 €/MWh**, while the **weekend average** followed the usual trend, dropping to **62,36 €/MWh.**



The market changes seen last week led to a narrowing of **Romania's hourly price spread**, which decreased from **209,99 €/MWh** to **144,65 €/MWh.**

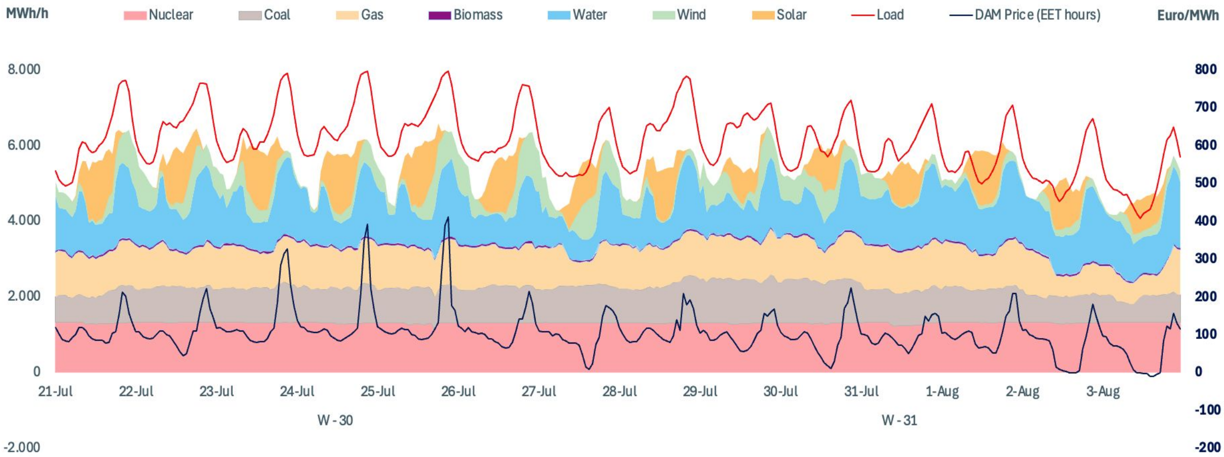
Energy Overview

	Week 30 GWh	Week 31 GWh	Variation % (EET Hours)
PRODUCTION	935	891	-4,7%
Nuclear	221	220	-0,2%
Coal	155	157	1,2%
Gas	177	168	-4,9%
Water	202	215	6,3%
Wind	81	53	-34,2%
Solar	89	69	-23,3%
Biomass	9	9	-4,8%
LOAD	1.068	987	-7,6%
SOLD	-133	-96	27,8%
DAM Price (EET hours) [Euro/MWh]	121,31	91,33	-24,7%



Electricity consumption and production were both lower last week, following an increase in the **previous week**, which was marked by the **highest daily price of the past two months on July 25**.

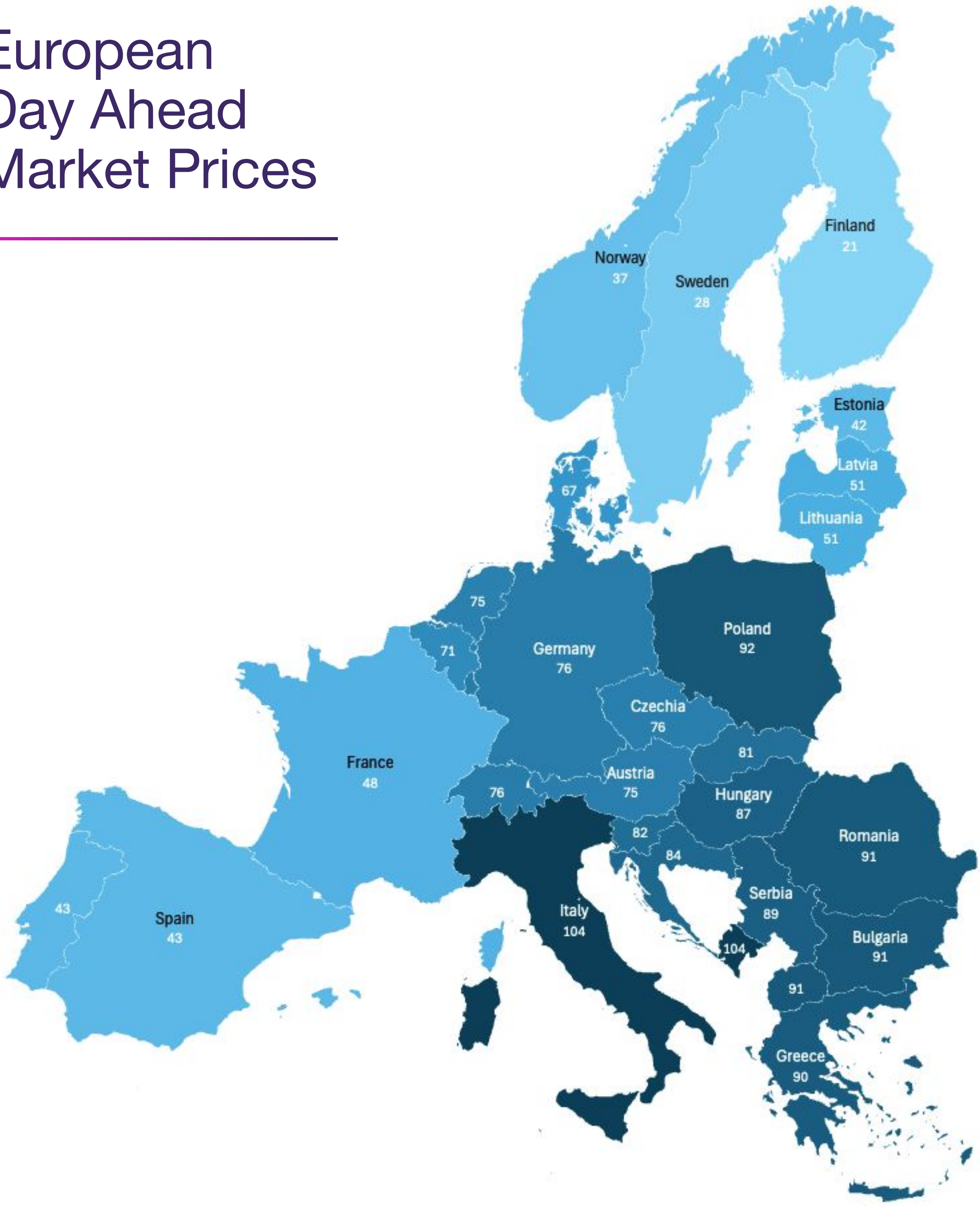
Hourly Generation



Electricity consumption grew by 8% last week, while **production saw a more modest increase of 5%.**

Despite the overall rise, both **wind and solar generation faced significant drops**, with **wind power declining by 34%** and **solar by 23%.**

European Day Ahead Market Prices



As July came to a close, European electricity prices dropped, with the **continental average falling to 70 €/MWh**, a **20% decrease** from the previous week. The biggest reductions were seen in **Southeast Europe**, with **Slovenia** down **32%**, **Croatia 29%**, and **Serbia, North Macedonia**, and **Greece** all decreasing by **26%. Romania** and **Bulgaria** saw a **25% drop**.

Italy and **Montenegro** kept prices above **100 €/MWh**, while **Finland** recorded the lowest at **21 €/MWh**. Compared to last year, most European prices dropped, except in **Northern** and **Central Europe**, where **Denmark** (+61%), **Finland** (+25%), and **Poland** (+4%) saw increases. The biggest declines were in **Spain** and **Portugal** (**55%**) and the **Baltics**, with **Estonia** down **56%**, and **Lithuania** and **Latvia** seeing drops of **47%** and **45%**.

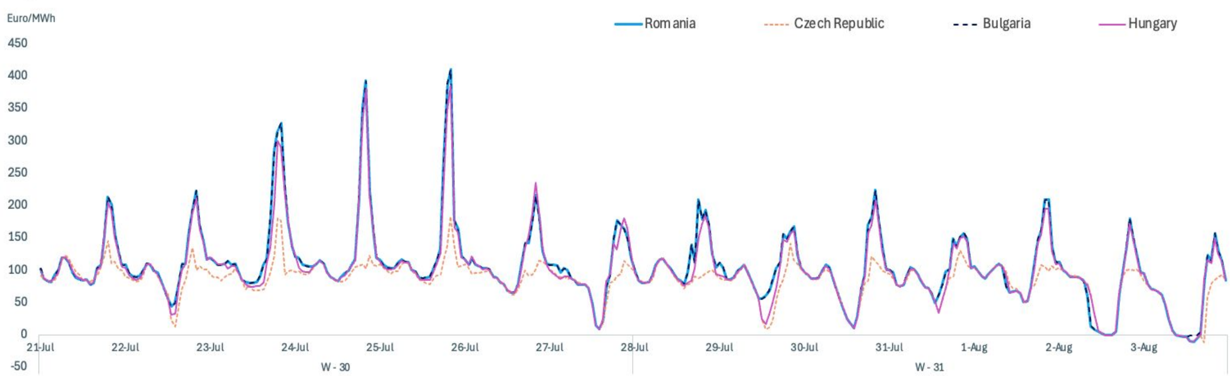
European Energy Context

DAM PRICES

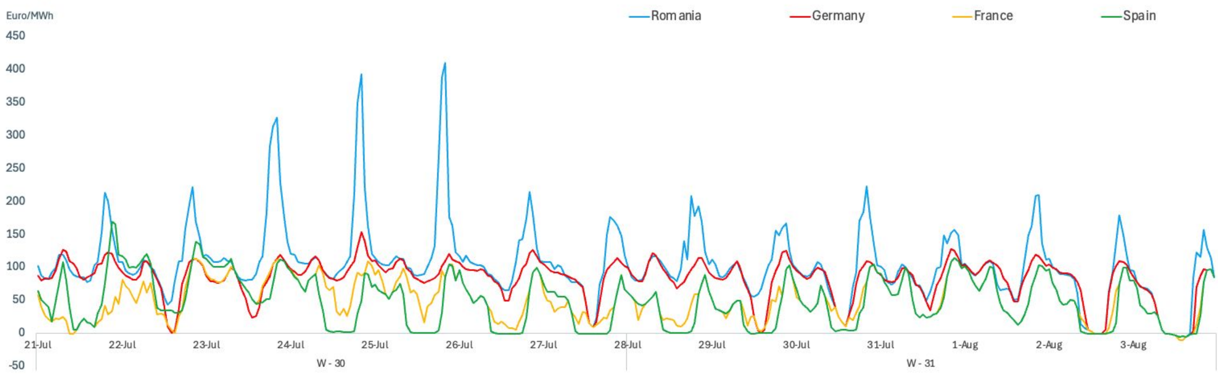
CET Hours

	Week 30 [Euro/MWh]	Week 31 [Euro/MWh]	Variation %
Romania	121,31	91,13	**-24,9%**
Bulgaria	121,31	91,31	**-24,7%**
Hungary	117,12	87,50	**-25,3%**
Czech Republic	93,44	75,60	**-19,1%**
Germany	89,63	76,44	**-14,7%**
France	56,50	47,94	**-15,1%**
Spain	54,70	43,28	**-20,9%**

Region



Europe



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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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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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