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# WEEKLY ENERGY REPORT

## 35 / 2025

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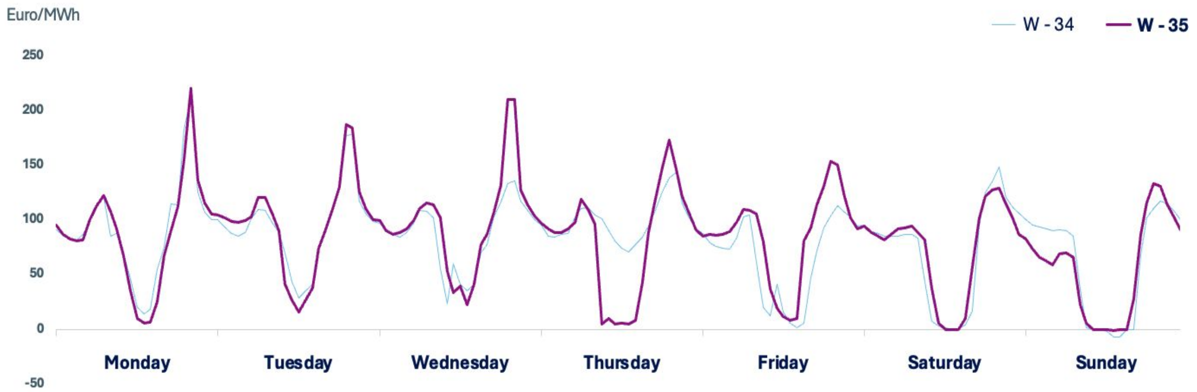
# Day Ahead Market Price

| DAM PRICES | | | CET Hours |
|---|---|---|---|
| | Week 34 [Euro/MWh] | Week 35 [Euro/MWh] | Variation % |
| Average Price | 81,17 | 82,85 | 2,07% |
| Maximum Price | 212,78 | 219,91 | 3,35% |
| Minimum Price | -7,45 | -0,98 | 87% |
| ΔPrice = max(average) - min(average) | 127,82 | 157,42 | 23,16% |

Romania's average price reached **83 €/MWh** last week, marking a modest **2% increase**. When ranked alongside the rest of Europe, sorted by price from highest to lowest, the country was positioned in the **lower segment, 20th out of 29**.

Compared to the **same week in 2024**, the country recorded a **reduced average**, part of a broader **continental trend**. The **most pronounced differences** came from the **southeast and west**, where current price levels stand **30 to 50% beneath** those seen last year.

# Hourly Prices




At **hour 21 on Monday**, **Romania's electricity price reached 220 €/MWh**, the **week's highest**, and one **shared by 11 other countries** during that same hour. The **most extreme value of the week**, though, was seen in **North Macedonia**, where prices rose to **707 €/MWh on Friday**.

The **lowest hourly value** was **-0,98 €/MWh**, noted on **Sunday at hour 14**. Across Europe, only **Austria** went further into negative territory, with a low of **-€42,67 €/MWh on Thursday**.

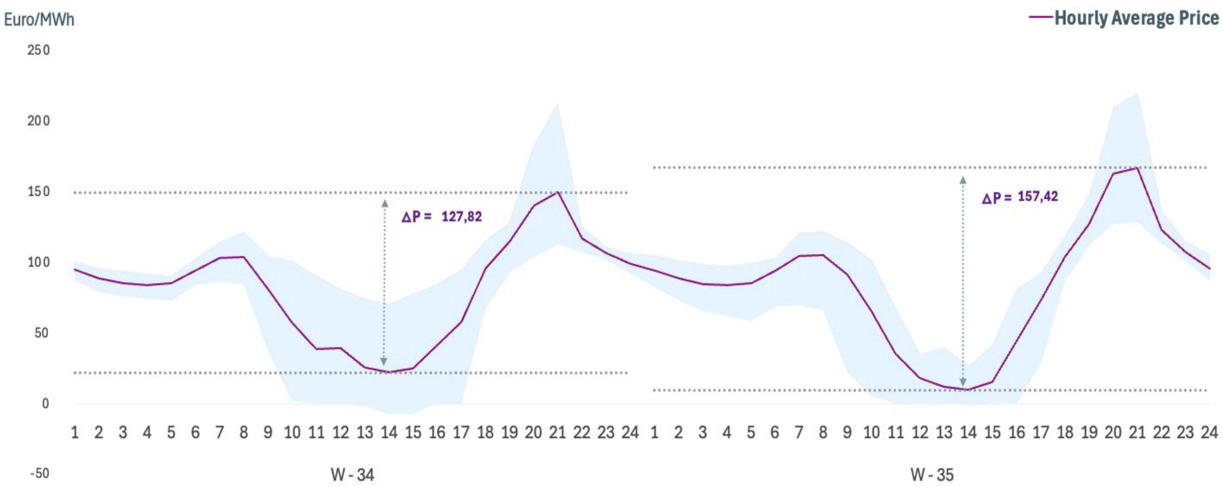
# Prices Spread

| Hour (CET) | Monday 25-Aug | Tuesday 26-Aug | Wednesday 27-Aug | Thursday 28-Aug | Friday 29-Aug | Saturday 30-Aug | Sunday 31-Aug | Average Price Week | Average Price Weekdays | Average Price Weekend |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | 95,28 | 104,79 | 99,75 | 97,15 | 85,27 | 94,21 | 82,55 | **94,14** | **96,45** | **88,38** |
| 2 | 87,03 | 101,58 | 90,32 | 92,08 | 86,39 | 88,75 | 73,17 | **88,47** | **91,48** | **80,96** |
| 3 | 82,86 | 98,86 | 86,85 | 88,06 | 86,14 | 84,93 | 65,46 | **84,74** | **88,55** | **75,20** |
| 4 | 80,34 | 97,48 | 88,34 | 88,30 | 86,77 | 81,51 | 61,86 | **83,51** | **88,25** | **71,69** |
| 5 | 81,22 | 99,62 | 91,55 | 92,09 | 89,12 | 86,37 | 58,76 | **85,53** | **90,72** | **72,57** |
| 6 | 100,31 | 102,71 | 99,42 | 97,30 | 97,51 | 91,79 | 68,99 | **94,00** | **99,45** | **80,39** |
| 7 | 112,77 | 120,36 | 109,92 | 118,37 | 109,35 | 92,44 | 69,54 | **104,68** | **114,15** | **80,99** |
| 8 | 121,75 | 120,88 | 115,43 | 109,46 | 108,63 | 94,47 | 65,91 | **105,22** | **115,23** | **80,19** |
| 9 | 108,06 | 106,07 | 113,64 | 95,66 | 104,94 | 88,36 | 22,31 | **91,29** | **105,67** | **55,34** |
| 10 | 91,97 | 90,00 | 101,63 | 5,11 | 80,12 | 81,80 | 5,34 | **65,14** | **73,77** | **43,57** |
| 11 | 66,84 | 41,35 | 52,77 | 10,10 | 37,05 | 37,75 | 0,00 | **35,12** | **41,62** | **18,88** |
| 12 | 35,02 | 26,65 | 33,41 | 5,11 | 19,19 | 5,23 | -0,01 | **17,80** | **23,88** | **2,61** |
| 13 | 10,00 | 16,00 | 39,57 | 5,42 | 11,28 | 0,00 | -0,10 | **11,74** | **16,45** | **-0,05** |
| 14 | 5,93 | 26,28 | 22,86 | 5,10 | 8,43 | 0,00 | -0,98 | **9,66** | **13,72** | **-0,49** |
| 15 | 6,78 | 38,05 | 41,35 | 8,43 | 10,07 | 0,00 | -0,60 | **14,87** | **20,94** | **-0,30** |
| 16 | 25,20 | 73,77 | 77,58 | 42,73 | 80,64 | 9,38 | 0,00 | **44,19** | **59,98** | **4,69** |
| 17 | 67,62 | 90,52 | 86,78 | 88,74 | 92,42 | 56,63 | 27,24 | **72,85** | **85,22** | **41,94** |
| 18 | 89,74 | 109,86 | 107,04 | 118,73 | 113,53 | 100,89 | 85,69 | **103,64** | **107,78** | **93,29** |
| 19 | 111,97 | 130,09 | 131,08 | 147,91 | 130,53 | 121,03 | 115,64 | **126,89** | **130,32** | **118,34** |
| 20 | 154,17 | 186,99 | 209,97 | 173,04 | 153,60 | 127,24 | 133,25 | **162,61** | **175,55** | **130,25** |
| 21 | 219,91 | 184,04 | 210,39 | 146,28 | 149,83 | 128,58 | 130,56 | **167,08** | **182,09** | **129,57** |
| 22 | 136,69 | 125,61 | 126,85 | 121,04 | 121,27 | 114,96 | 113,31 | **122,82** | **126,29** | **114,14** |
| 23 | 115,04 | 109,78 | 113,63 | 106,03 | 101,98 | 101,05 | 101,76 | **107,04** | **109,29** | **101,41** |
| 24 | 105,15 | 100,02 | 103,57 | 91,21 | 91,53 | 86,30 | 90,50 | **95,47** | **98,30** | **88,40** |
| **Average** | **87,99** | **95,89** | **98,07** | **81,39** | **85,65** | **73,90** | **57,09** | **82,85** | **89,80** | **65,50** |
| **ΔPrice** | **213,98** | **170,99** | **187,53** | **167,94** | **145,17** | **128,58** | **134,23** | **157,42** | **168,37** | **130,74** |

**Maximum** **Minimum**

[Euro/MWh]

Weekday averages rose to **89,80 €/MWh**, driven by pronounced **evening peaks** that frequently exceeded **150 €/MWh.** By the weekend, the pace slowed, with a lower average of **65,50 €/MWh** and flatter daily curves.

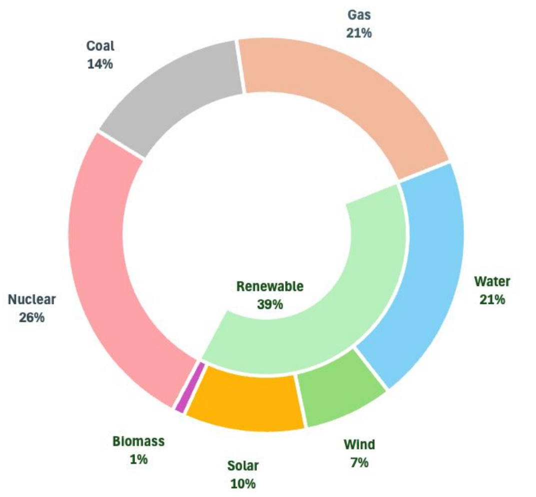



Compared to last week, the spread widened and reached **157 €/MWh**, driven by the recurring peaks that contrasted with softer midday and weekend hours.

# Energy Overview

| | Week 34 | Week 35 | Variation |
|---|---|---|---|
| | GWh | GWh | % |
| PRODUCTION | 873 | 860 | -1,5% |
| Nuclear | 219 | 224 | 2,3% |
| Coal | 118 | 118 | 0,6% |
| Gas | 174 | 183 | 5,2% |
| Water | 167 | 177 | 5,6% |
| Wind | 127 | 63 | -50,4% |
| Solar | 64 | 86 | 35,6% |
| Biomass | 5 | 9 | 88,7% |
| LOAD | 923 | 908 | -1,6% |
| SOLD | -50 | -48 | 3,5% |
| DAM Price (EET hours) [Euro/MWh] | 81,18 | 82,91 | 2,1% |

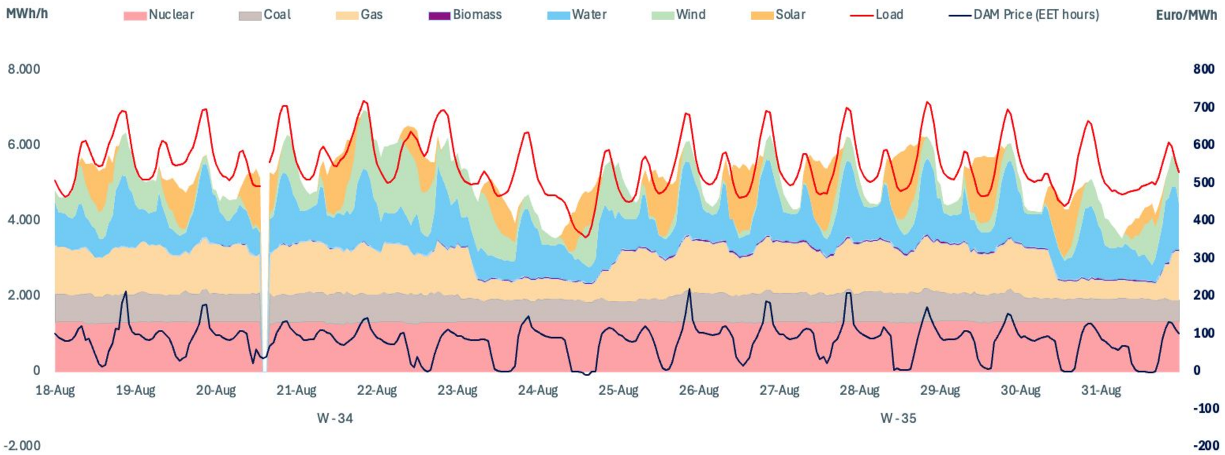
EET Hours




**Electricity production and consumption both saw a slight decline of around 2%.**

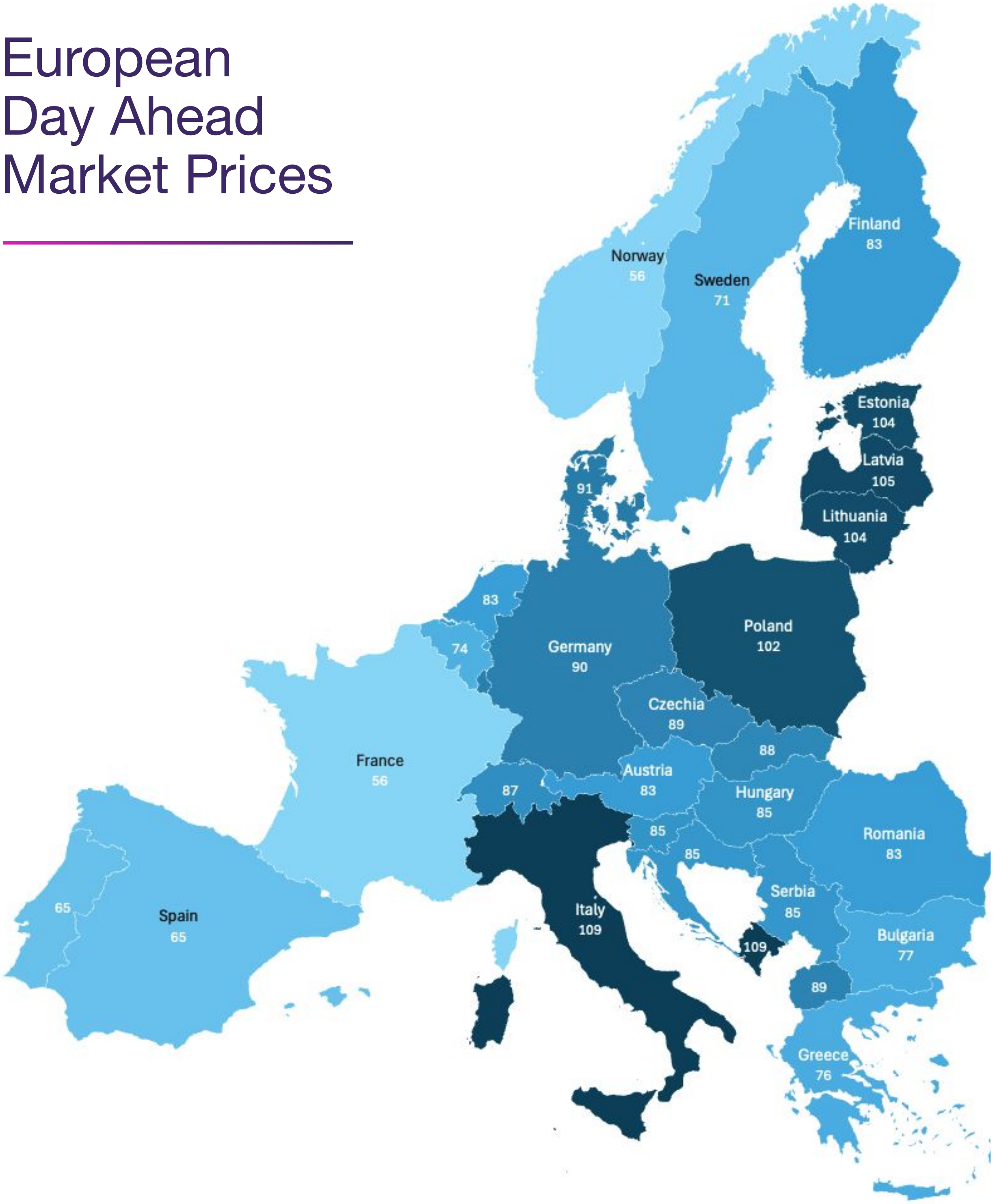
The overall supply mix remained balanced, with renewables holding a 39% share and conventional sources covering the rest.

# Hourly Generation




**Wind output dropped by half**, while **solar gained 35%** and **hydro added another 10 GWh**. Together, these increases tempered the impact of the wind decline, keeping **overall production nearly unchanged** from the previous week.

# European Day Ahead Market Prices




European spot prices averaged **85 €/MWh** last week, a slight increase from the previous **82 €/MWh**. Western markets like **France**, **Spain**, and **Portugal** continued to move lower, while **Nordic and Baltic countries** reversed course with stronger gains. **Sweden** led with a **62%** weekly increase, followed by **Norway** and **Poland**.

The weekly highs came from **Italy** and **Montenegro**, both at **109 €/MWh**, with the **Baltic states** and **Poland** not far behind. **France**, instead, reported the lowest average, at **56 €/MWh**.

In the North, **prices have shifted from 2024 levels**: up nearly **13x** in Finland and over **7x** in Sweden.

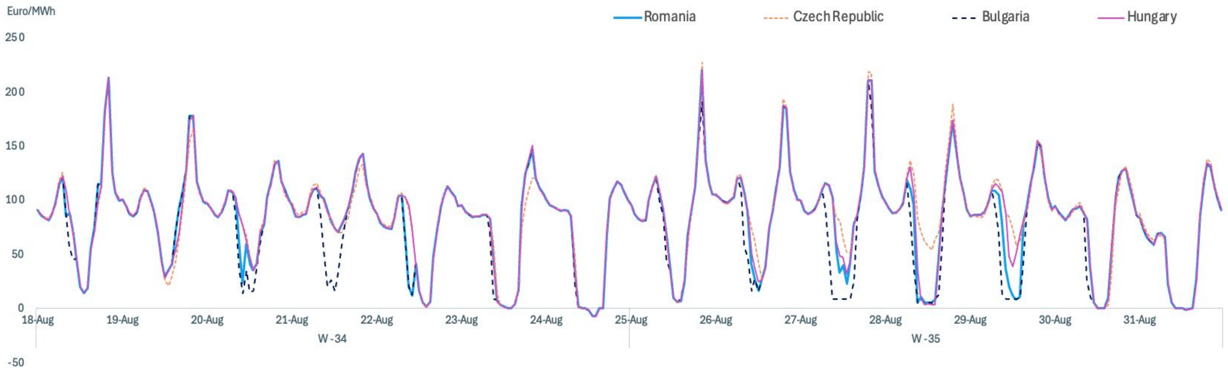
# European Energy Context

## DAM PRICES

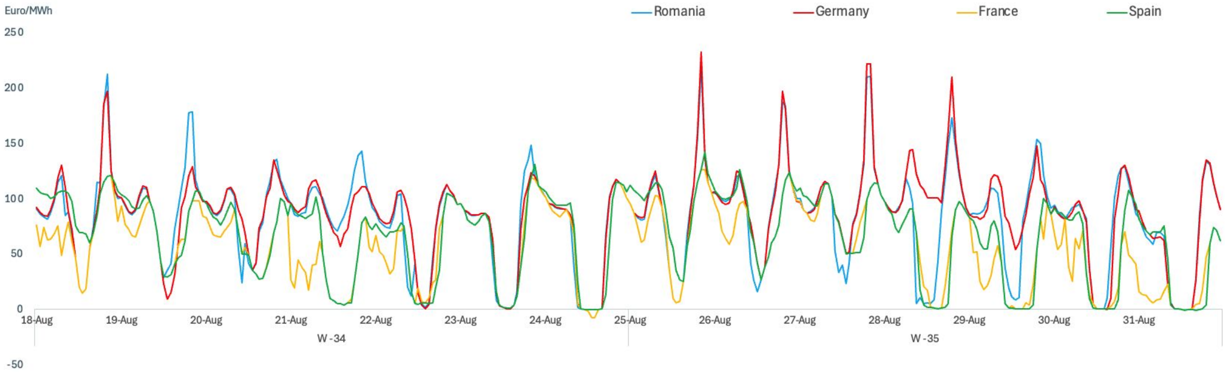
CET Hours

| | Week 34 [Euro/MWh] | Week 35 [Euro/MWh] | Variation % |
|---|---|---|---|
| **Romania** | 81,17 | 82,85 | **2,1%** |
| **Bulgaria** | 77,86 | 76,68 | **-1,5%** |
| **Hungary** | 82,60 | 85,12 | **3,1%** |
| **Czech Republic** | 81,58 | 89,06 | **9,2%** |
| **Germany** | 80,32 | 90,19 | **12,3%** |
| **France** | 58,48 | 55,56 | **-5,0%** |
| **Spain** | 67,98 | 65,37 | **-3,8%** |

**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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## 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.

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