

wiren

WEEKLY ENERGY REPORT

41 / 2025

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Day Ahead Market Price

DAM PRICES

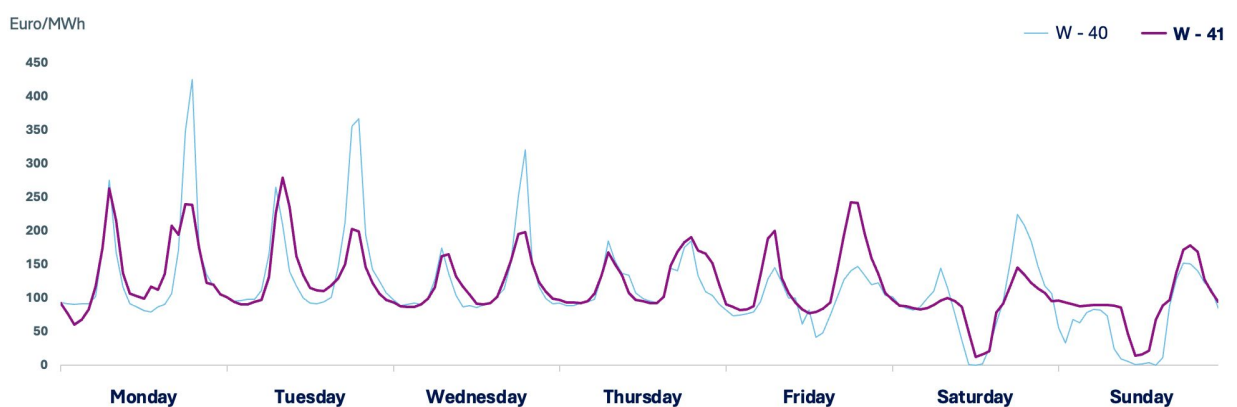
CET Hours

	Week 40 [Euro/MWh]	Week 41 [Euro/MWh]	Variation %
Average Price	114,48	120,04	4,85%
Maximum Price	425,83	280,06	-34,23%
Minimum Price	0,29	12,76	4.337%
$\Delta\text{Price} = \max(\text{average}) - \min(\text{average})$	200,30	125,10	-37,55%

Romania's day-ahead average settled at **120,04 €/MWh**, with intraday extremes ranging from a **maximum** of **280,06 €/MWh** to a **minimum** of **12,76 €/MWh**. The profile points to a firm weekly level, with fewer very low midday prints and a tempered evening peak compared with earlier periods.

In the regional context, **North Macedonia** posted the highest average at **132 €/MWh**, followed by **Lithuania** and **Latvia**, both at **126 €/MWh**. **Hungary** and **Romania** came next, at **121 €/MWh** and **120 €/MWh** respectively, placing Romania **5th** for the period.

Hourly Prices



The intraday profile displayed **pronounced morning peaks**, especially at the start of the week. Prices ramped sharply on **Monday** and again on **Tuesday morning**, with the **weekly maximum** occurring on **Tuesday, 7 October (hour 9, CET)** at **280 €/MWh**. This coincided with a broader regional spike: **Latvia** and **Lithuania** hit **1.000 €/MWh** in **hour 8** of the same morning, before conditions eased.

The **weekly minimum** was hit on **Saturday, 11 October (hour 13, CET)** at **12,76 €/MWh**. Overall, the curve kept a **morning-led** shape early in the week, with evening ramps present but less dominant than usual.



Prices Spread

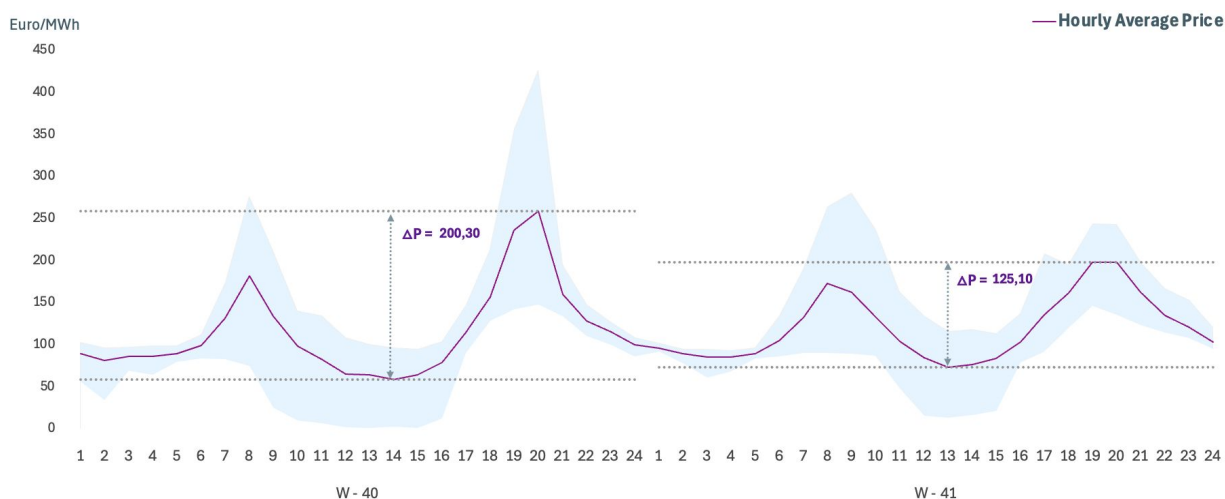
Hour (CET)	Monday 6-Oct	Tuesday 7-Oct	Wednesday 8-Oct	Thursday 9-Oct	Friday 10-Oct	Saturday 11-Oct	Sunday 12-Oct	Average Price Week	Average Price Weekdays	Average Price Weekend
1	92,46	101,23	93,45	97,59	91,15	97,12	96,53	95,65	95,18	96,82
2	77,43	94,41	88,44	93,47	87,64	89,45	93,97	89,26	88,28	91,71
3	60,32	91,10	87,56	94,25	82,63	88,32	90,58	84,96	83,17	89,45
4	68,12	90,69	87,48	92,83	82,99	85,29	87,76	85,02	84,42	86,53
5	83,23	94,83	91,01	95,51	87,87	83,70	88,77	89,27	90,49	86,23
6	117,04	97,94	99,32	107,41	134,11	85,50	89,71	104,43	111,16	87,61
7	174,19	131,34	116,56	133,52	188,74	90,27	89,61	132,03	148,87	89,94
8	263,84	226,68	162,89	167,99	200,64	96,75	89,97	172,68	204,41	93,36
9	215,19	280,06	165,28	150,01	131,04	100,52	88,99	161,58	188,32	94,75
10	136,95	236,36	132,12	134,28	108,09	95,97	86,16	132,85	149,56	91,07
11	107,24	162,39	117,35	108,22	93,64	87,14	47,45	103,34	117,77	67,29
12	102,97	134,19	105,21	97,83	83,60	49,48	14,80	84,01	104,76	32,14
13	99,04	115,69	91,86	95,71	78,00	12,76	16,00	72,72	96,06	14,38
14	117,66	111,50	91,04	92,87	79,68	16,00	22,10	75,83	98,55	19,05
15	113,04	111,01	92,56	92,47	84,42	21,09	68,42	83,29	98,70	44,76
16	136,35	119,01	101,90	102,72	93,92	78,63	88,72	103,03	110,78	83,67
17	207,99	129,22	127,47	148,10	142,42	91,66	97,24	134,87	151,04	94,45
18	194,69	150,34	156,41	169,75	195,15	119,51	139,28	160,73	173,27	129,40
19	240,00	203,00	196,14	183,54	243,33	145,98	172,23	197,74	213,20	159,10
20	239,07	199,67	198,13	191,20	242,23	135,38	179,05	197,82	214,06	157,22
21	174,70	146,40	152,17	170,86	197,05	122,65	169,74	161,94	168,23	146,19
22	123,49	123,24	123,94	166,47	160,32	114,43	127,43	134,19	139,49	120,93
23	120,17	107,42	109,85	152,41	136,02	108,39	109,98	120,61	125,17	109,18
24	106,44	97,48	99,31	119,84	108,12	95,24	94,63	103,01	106,24	94,93
Average	140,48	139,80	120,31	127,45	130,53	87,97	93,71	120,04	131,72	90,84
ΔPrice	203,52	189,37	110,64	98,72	165,32	133,22	164,25	125,10	130,89	144,73

Maximum

Minimum

[Euro/MWh]

The weekly outcome of **120,04 €/MWh** masks a clear split: **131,72 €/MWh** on **weekdays** versus **90,84 €/MWh** on the **weekend**, underscoring the working-day premium over lighter weekend conditions.

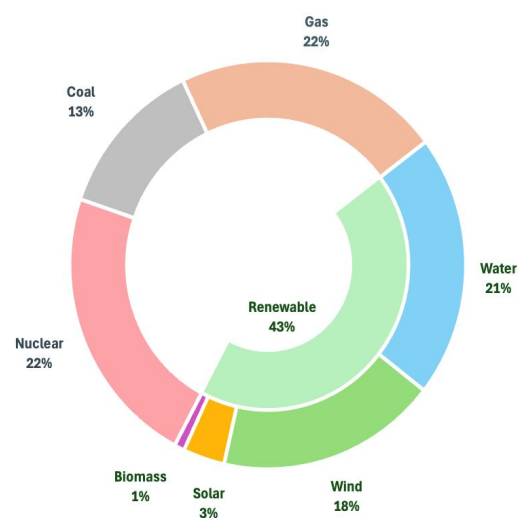


The **hourly price spread** narrowed noticeably during the analysed week, decreasing from **200,30 €/MWh** to **125,10 €/MWh**. This contraction indicates a more stable intraday structure, with fewer extreme differences between peak and off-peak hours.



Energy Overview

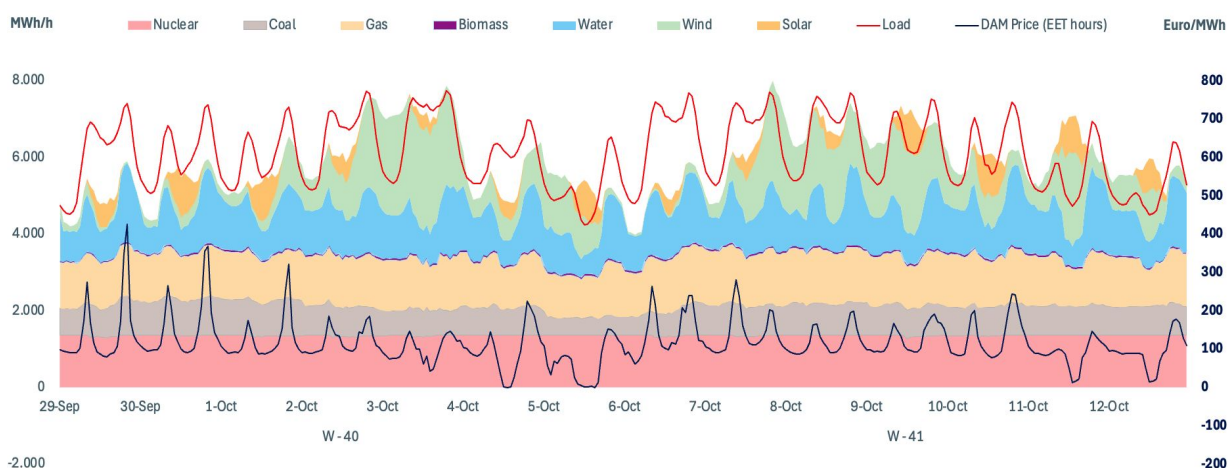
	EET Hours		
	Week40 GWh	Week41 GWh	Variation %
PRODUCTION	960	1.018	6,1%
Nuclear	228	228	0,2%
Coal	129	130	0,4%
Gas	209	222	5,8%
Water	200	212	6,2%
Wind	152	183	20,5%
Solar	33	35	4,3%
Biomass	8	8	3,5%
LOAD	1.023	1.035	1,2%
SOLD	-63	-16	74,0%
DAM Price (EET hours) [Euro/MWh]	114,56	119,98	4,7%



Total electricity production increased by **6,1%**, reaching **1.018 GWh**, supported by higher renewable and gas-based generation.

Electricity demand (load) also rose slightly, up **1,2%** to **1.035 GWh**, while net exports narrowed significantly, with the country selling only **16 GWh** compared to **63 GWh** in the previous week.

Hourly Generation



The generation mix for the week was **43% renewables** and **57% conventional**. Within renewables: **hydro ~21%**, **wind ~18%**, **solar ~3%**, **biomass ~1%**. Conventional output comprised **nuclear ~22%**, **gas ~22%**, and **coal ~13%**.

Week over week, total production rose to **1,018 GWh (+6,1%)**, led by **wind +20,5%** (183 GWh) and **hydro +6,2%** (212 GWh); **gas** also increased (**+5,8%**, 222 GWh), while **nuclear** was broadly flat (228 GWh) and **coal** edged up (**+0,4%**, 130 GWh).



European Day Ahead Market Prices



The European day-ahead average reached **99 €/MWh**, marking the **third consecutive weekly increase**. Nearly **70% of the spot markets** recorded weekly averages above **100 €/MWh**. Positive weekly variations were observed across most markets, led by **France (+83%)**, followed by **Lithuania** and **Latvia** (both **+48%**). Only a few registered declines: **Sweden (-13%)**, **Greece (-8%)**, **Finland (-4%)**, and **Austria (-3%)**.

The **lowest prices** continued to be recorded in the **Nordic region**, with **Sweden** at **29 €/MWh**, **Norway** at **40 €/MWh**, and **Finland** at **41 €/MWh**. Compared with the same week last year, **Latvia** and **Lithuania** recorded prices nearly **double**, while **Italy** was the only market showing a slight annual decrease (**-2%**).



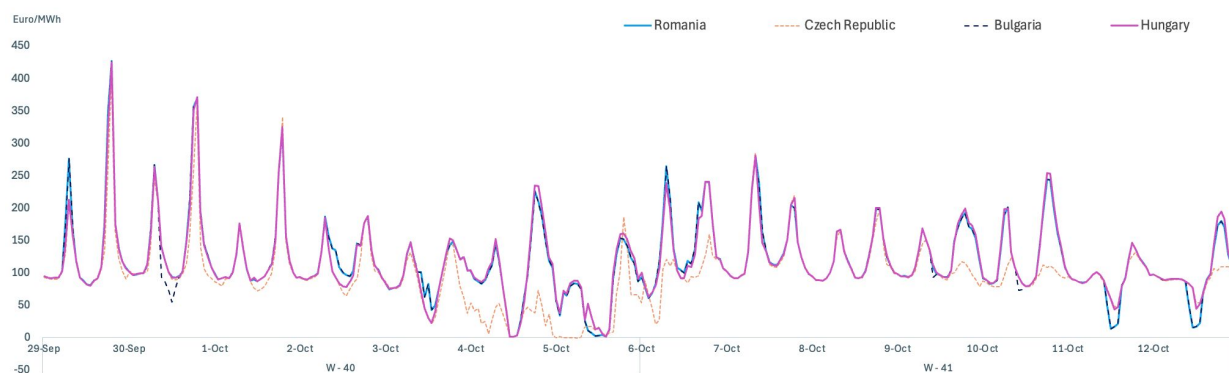
European Energy Context

DAM PRICES

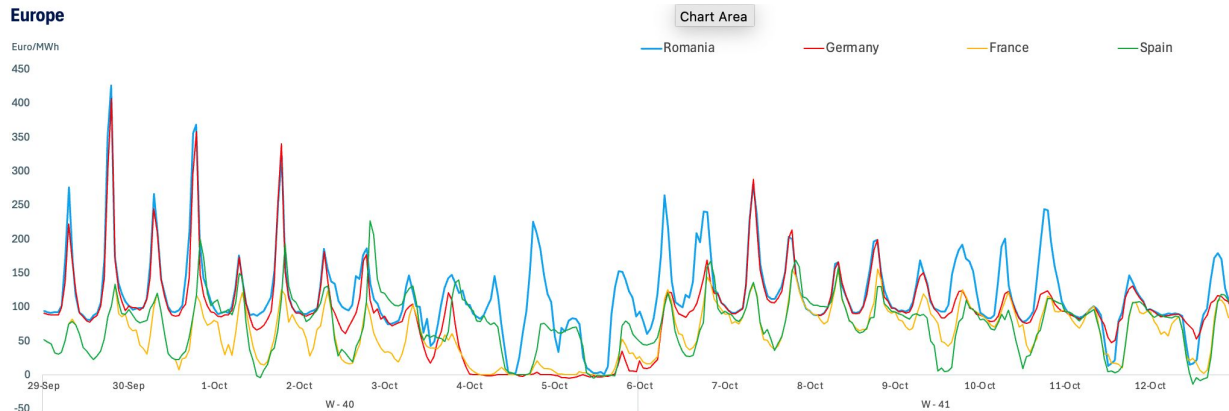
CET Hours

	Week 40 [Euro/MWh]	Week 41 [Euro/MWh]	Variation %
Romania	114,48	120,04	4,9%
Bulgaria	113,50	119,75	5,5%
Hungary	113,40	121,46	7,1%
Czech Republic	89,97	104,06	15,7%
Germany	79,17	103,27	30,4%
France	42,94	78,47	82,7%
Spain	69,97	76,47	9,3%

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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Wiren Weekly Energy Report (WVER) is a personalized guide to the Romanian and European energy markets, with focus on most important highlights and events from previous week.