

Romania Power - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Romania Power Market size is estimated at 20.10 gigawatt in 2025, and is expected to reach 26.47 gigawatt by 2030, at a CAGR of 5.66% during the forecast period (2025-2030).

Key Highlights

- In the medium period, factors such as the growing demand for renewable energy, upcoming investments in the energy sector, and supportive renewable energy policies are driving the market's growth.
- On the other hand, the high initial investment cost, long investment return period on projects, and limited natural resources are expected to restrain the Romanian power market during the forecast period.
- Nevertheless, the Romanian government announced plans to invest over EUR 22.6 billion (USD 26.7 billion) in the power sector between 2020 and 2030. This is expected to create immense opportunities for the Romanian power market.

Romania Power Market Trends

The Hydropower Segment is Expected to Witness Significant Growth

- Romania's energy mix is dominated by hydrocarbon energy sources such as coal, oil, and natural gas. This scenario is changing fast with the growth of hydropower and solar energy.
- Hydropower is the largest source of renewable energy in Romania. Romania has great potential for more than 9GW, but as of 2023, only 72% of the total hydropower capacity was utilized. Hence, the country has the potential to explore more areas to

capture hydroelectric power.

- Romania is seeking to derive more of its energy needs from renewable sources. Romania is seen as a fast-growing hydropower market in Southeast Europe.
- According to the International Renewable Energy Agency (IRENA) Renewable Energy Statistics 2024, the total capacity of hydropower energy sources was 6,666 MW. This is expected to grow significantly with upcoming projects during the forecast period.
- In August 2023, Romania and Bulgaria agreed to develop two Danube hydropower projects. Hidroelectrica, a Romanian state-owned firm, will be the principal contractor for both Danube projects. The two hydropower plants are expected to take five to six years to build. The first power plant will be between Romania's Turnu Magurele and Bulgaria's Nikopol. It will have an 840 MW capacity.
- Thus, owing to such points, the hydropower segment is expected to witness significant growth during the forecast period.

Supportive Renewable Energy Policies are Expected to Drive the Market

- Romania has announced numerous policies to support the renewable energy sector. These policies help meet the obligations set by the European Union (EU) in terms of greenhouse gas emissions through its legislative package.
- Romania's Integrated National Plan in the field of Energy and Climate Change (PNIESC) proposes 5.1 GWh of solar and 5.3 GWh of wind capacities by 2030 and increasing the number of energy prosumers.
- Under CfD, the producers enter a private contract with the nominated counterparty, under which the parties agree on a strike price. The producer sells the electricity at market prices. If the market prices are below the strike price, then the counterparty pays the difference to the producer, and if the market price is above the strike price, the producer pays the difference to the counterparty.
- The CfD ensures a consistent electricity price to power plant owners, protecting them from market risks associated with electricity price volatility. Given the success of the CfD in the United Kingdom and the existing obstacles presented by uncertain electricity prices for the power market, CfD is expected to be a major market driver.
- According to the International Renewable Energy Agency (IRENA) Renewable Energy Statistics 2024, the total capacity of renewable energy sources was 11,763 megawatts (MW). This is expected to grow significantly with supportive government policies and upcoming projects during the forecast period.
- Moreover, in January 2024, the Romanian Government announced that they are allocating EUR 815 million in grants to incentivize investments in solar, wind, and hydropower production across Romania. The Ministry of Energy launched two funding calls in March 2024 aimed at small, medium, and large enterprises, disbursing funds from the EU's Modernisation Fund.
- Furthermore, in June 2023, the Romanian government signed a support agreement with state-owned Nuclearelectrica to develop national strategic projects for building Cernavoda nuclear power plant units 3 and 4.
- Therefore, such supportive renewable policies are expected to drive the Romanian power market in the forecast period.

Romania Power Industry Overview

The Romanian power market is moderately fragmented. Some of the key players in the market are Romelectro SA, SGS SA, Enel SpA, Siemens Gamesa Renewable Energy SA, and Vestas Wind Systems AS.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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