

Romania Power - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Romania Power Market Analysis

The Romania Power Market was valued at 25.29 gigawatt in 2025 and estimated to grow from 27.17 gigawatt in 2026 to reach 38.86 gigawatt by 2031, at a CAGR of 7.42% during the forecast period (2026-2031).

Current growth hinges on three structural shifts: steady retirement of coal assets, rapid solar and wind build-out enabled by the 2024 Contracts for Difference (CfD) scheme, and visible progress on grid-modernization projects supported by EU grants. Developers now face fewer regulatory hurdles after 2022 permitting reforms, while auction-indexed strike prices below wholesale averages have derisked merchant exposure and attracted broad international equity interest. Rising corporate demand for long-term renewable power-purchase agreements (PPAs) is amplifying investment in behind-the-meter solar-plus-storage, and fresh capital from the Hidroelectrica IPO and OMV Petrom's renewables acquisitions is intensifying competition across asset classes. Simultaneously, the Black Sea offshore wind framework unlocks a large maritime resource that can diversify the generation mix, provided transmission upgrades arrive on schedule.

Romania Power Market Trends and Insights

EU Green Deal Decarbonisation Targets Drive Capacity Additions

Romania's pledge to supply 38% of electricity from renewables by 2030 has reoriented national planning toward wind, solar, and

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hydropower build-out. Approval of a EUR 3 billion CfD program in November 2024 allocated 5 GW at winning strike prices of EUR 65/MWh for wind and EUR 51/MWh for solar, well below the 2024 day-ahead wholesale average. Utility-scale solar installations jumped by 2 GW in 2024 alone, illustrating how quickly projects move once grid links and land permits are secured. Wind growth lags due to longer environmental assessments, yet Dobrogea's 7 m/s resource remains attractive for developers with seasoned local partners. The upcoming carbon border adjustment mechanism further encourages domestic manufacturers to switch to low-carbon electricity, reinforcing demand certainty for new plants.

Rising Corporate PPA Demand from Energy-Intensive Exporters

Romanian automotive, steel, and chemicals groups now favor multi-year PPAs to hedge OPCOM price swings and satisfy Scope 2 reporting under the Corporate Sustainability Reporting Directive. NextE's 42.9 MW on-site solar deal signed in 2024 priced power near EUR 50/MWh, beating the prior year's EUR 90-120/MWh wholesale range. This differential triggered fresh tenders in Timis and Arges and pushed local lenders to refine credit benchmarks for long-term offtakes. An EIB survey found 81% of firms rating energy costs a top competitiveness threat, with 57% spending on on-site efficiency upgrades and 90% on greenhouse-gas measures. As the PPA ban lifted in 2022, bankable offtakes became feasible, transferring volume risk away from utilities and into bilateral contracts.

High Upfront CAPEX & Permitting Lead-Times

Utility-scale PV typically clears permits within three years, yet wind projects average 6.5 years because multi-agency reviews include environment, heritage, and land-use approvals. Archaeological rules require digs within 500 m of ancient sites, impacting roughly 30% of planned Dobrogea wind locations. Developers also shoulder substation costs that can exceed EUR 50 million before grid access is guaranteed. ANRE's proposal for capacity auctions adds further uncertainty, potentially pushing smaller independent power producers out of contention, given higher carrying costs.

Other drivers and restraints analyzed in the detailed report include:

EU-Funded Grid-Modernisation Grants Unlock Transmission Capacity
Newly-Approved Black Sea Offshore Wind Framework
Ageing Grid Causes Renewable Curtailment Risk

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Renewables contributed 68.02% of 2025 capacity, and their 8.48% growth pace keeps the Romania power market size expansion aligned with EU emission goals. Hydropower alone held a 33.12% share, courtesy of Hidroelectrica's 6.5 GW fleet that supports peak shaving and frequency response. Wind capacity reached 3 GW, with 2.5 GW more awarded in the CfD auction at EUR 65/MWh, pricing that underlines a maturing cost curve. Solar jumped past 5.3 GW after 2 GW was connected in 2024, helped by modules priced below USD 0.18/W and fast-track permits for projects under 10 MW. The Black Sea offshore framework could add 3-7 GW by 2035, giving Romania a fresh nucleus for high-factor generation and bolstering energy-security margins. Gas-fired capacity rises modestly as flexible CCGTs linked to Neptun Deep output replace retiring coal. Nuclear remains vital; Cernavoda Units 1-2 generate one-fifth of supply, while Units 3-4 plus the 462 MW Doicești SMR will anchor firm, low-carbon baseload later in the decade.

The shift reshapes asset economics, as capacity-weighted average LCOE for new projects reaches EUR 48/MWh for solar and EUR 56/MWh for onshore wind, both below 2024 wholesale prices. Curtailment risk tempers enthusiasm in congestion-prone southern counties, yet co-located storage can secure higher balancing fees. Accordingly, project sponsors aggregate PV with 4-hour

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batteries sized at 25% of nameplate capacity to capture arbitrage spreads.

The Romania Power Market Report is Segmented by Power Source (Thermal, Nuclear, and Renewables) and End-User (Utilities, Commercial and Industrial, and Residential). The Market Sizes and Forecasts are Provided in Terms of Installed Capacity (GW).

List of Companies Covered in this Report:

Romelectro SA SGS SA Enel (PPC) Romania Siemens Gamesa Renewable Energy SA Vestas Wind Systems AS Electroalfa Sunshine Solar Energy SRL Danagroup.hu NIVUS GmbH CEZ Romania Hidroelectrica SA OMV Petrom SA Nuclearelectrica SA Transelectrica SA Electrica SA Engie Romania E.ON Delgaz Grid Tinmar Energy Verbund (Black-Sea Wind) PPC Renewables Romania

Additional Benefits:

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

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