



AOI Receives First Volume Order of 800G Data Center Transceivers from Major Hyperscale Customer

December 10, 2025

SUGAR LAND, Texas, Dec. 10, 2025 (GLOBE NEWSWIRE) -- Applied Optoelectronics Inc. (NASDAQ: AAOI), a leading provider of advanced optical and HFC networking products that power the internet, today announced it received its first volume order for its 800G data center transceivers from a major hyperscale customer to support its AI data center growth.

"We are pleased to receive our first volume order for our 800G products from this major hyperscale customer," said Dr. Thompson Lin, Founder, Chairman, and CEO of AOI. "Our customers need optical solutions that can scale to support the speed and performance required for today's AI-powered data transmissions, and we believe that AOI is uniquely positioned to meet the demands for high volume transceiver shipments with our automated production lines that we have spent years developing. With this new order, we remain on track to meet our 800G shipment expectations by year end, which as we previously stated, could contribute between \$4-8 million to our total revenue in Q4."

"In addition to this progress we are making on 800G, this customer is swiftly ramping its utilization of our 400G transceivers. To-date this year, it has placed orders for nearly \$22 million worth of 400G transceivers, which includes delivery of \$13 million worth of these transceivers so far in Q4," said Stefan Murry, Chief Financial Officer and Chief Strategy Officer at AOI.

Additional Resources:

- [AOI Optical Transceivers](#)

Forward-Looking Information

This press release contains forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. In some cases, you can identify forward-looking statements by terminology such as "believe," "may," "estimate," "continue," "remain," "anticipate," "intend," "should," "could," "would," "target," "seek," "aim," "predicts," "think," "objectives," "optimistic," "new," "goal," "strategy," "potential," "is likely," "is inline," "on track," "will," "expect," "plan" "project," "permit" or by other similar expressions that convey uncertainty of future events or outcomes. These statements include management's beliefs and expectations related to our outlook for the remainder of the fourth quarter of 2025. Such forward-looking statements reflect the views of management at the time such statements are made. These forward-looking statements involve risks and uncertainties, as well as assumptions and current expectations, which could cause the company's actual results to differ materially from those anticipated in such forward-looking statements. These risks and uncertainties include but are not limited to: reduction in the size or quantity of customer orders; change in demand for the company's products due to industry conditions; changes in manufacturing operations; volatility in manufacturing costs; delays in shipments of products; disruptions in the supply chain; change in the rate of design wins or the rate of customer acceptance of new products; our reliance on a small number of customers for a substantial portion of our revenues; potential pricing pressure; a decline in demand for our customers' products or their rate of deployment of their products; general conditions in the internet datacenter, cable television (CATV) broadband, telecom, or fiber-to-the-home (FTTH) markets; changes in the world economy (particularly in the United States and China); changes in the regulation and taxation of international trade, including the imposition of tariffs; changes in currency exchange rates; the negative effects of seasonality; and other risks and uncertainties described more fully in the company's documents filed with or furnished to the Securities and Exchange Commission, including our Annual Report on Form 10-K for the year ended December 31, 2024 and our Quarterly Report on Form 10-Q for the quarter ended September 30, 2025. More information about these and other risks that may impact the company's business are set forth in the "Risk Factors" section of the company's quarterly and annual reports on file with the Securities and Exchange Commission. You should not rely on forward-looking statements as predictions of future events. All forward-looking statements in this press release are based upon information available to us as of the date hereof and are qualified in their entirety by this cautionary statement. Except as required by law, we assume no obligation to update forward-looking statements for any reason after the date of this press release to conform these statements to actual results or to changes in the company's expectations.

About AOI

Applied Optoelectronics, Inc. (AOI) is a leading developer and manufacturer of advanced optical and HFC networking products that are the building blocks for AI datacenters, CATV and broadband fiber access networks around the world. AOI supplies this critical infrastructure to tier-one customers across cloud computing, CATV broadband, telecom, and FTTH markets. The company has R&D facilities in Atlanta, GA, and engineering and manufacturing facilities at its corporate headquarters in Sugar Land, TX, as well as in Taipei, Taiwan and Ningbo, China. For additional information, visit www.ao-inc.com.

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