AOI Receives New Upsized Order for 800G Data Center Transceivers from Major Hyperscale Customer

April 2, 2026

SUGAR LAND, Texas, April 02, 2026 (GLOBE NEWSWIRE) -- Applied Optoelectronics Inc. (NASDAQ: AAOI), a leading provider of advanced optical and HFC networking products that power AI, today announced it has received a new $71 Million order for 800G single-mode data center transceivers from one of its major hyperscale customers. This marks $124 Million in orders from this customer since mid-March, which will more than double the existing backlog from this customer.

“This increased order for our 800G transceivers reflects both the customer’s confidence in AOI and the growing demand for 800G optics,” said Dr. Thompson Lin, Founder, Chairman, and CEO of AOI. “Following product qualification, we expect to begin delivering both the initial order—totaling more than $53 million—and this additional order in the second quarter. We anticipate completing delivery of the initial order in the third quarter, with this new order by end of this year. We also recently shipped the first 10,000 units of an 800G single-mode transceiver order to another hyperscale datacenter customer.”

Additional Resources:

- AOI Optical Transceivers
- AOI Newsroom

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," "anticipate," "intend," "should," "could," "would," "target," "seek," "aim," "predicts," "think," "objectives," "optimistic," "new," "goal," "strategy," "potential," "is likely," "will," "expect," "plan" "project," "permit" or by other similar expressions that convey uncertainty of future events or outcomes. These statements include management’s expectations related to our outlook for 2026, including statements related to the timing of deliveries of orders and size of such orders. 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; the company's reliance on a small number of customers for a substantial portion of its 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, 2025. More information about these and other risks that may impact the company's business is 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 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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