Delivery Date Optical Amplifier 800G



Overview

“Our customers are adopting 800G not just for capacity and performance, but to manage long-term operating costs.

Key Takeaways

Initial deliveries of 800G optical transceivers from AOI are expected to begin in Q2 2026, with full completion of major orders by the end of 2026.

Current Market and Production Status

The 800G optical transceiver market is experiencing rapid growth, driven by AI and hyperscale data center expansion. Shipments of 800G modules are projected to double in 2025, with continued strong demand in 2026, particularly for coherent 800ZR modules and single-mode transceivers. Applied Optoelectronics Inc. (AOI) has secured multiple large orders from hyperscale customers, reflecting both high demand and confidence in their production capabilities.

AO

I Delivery TimelineAOI received a $71 million order in early April 2026, adding to a total of $124 million in orders from the same customer since mid-March. Following product qualification, initial deliveries of over $53 million worth of 800G transceivers are expected in Q2 2026, with the remainder of the new order scheduled for completion by the end of 2026.

AO

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I has already shipped the first 10,000 units of 800G single-mode transceivers to another hyperscale customer, indicating that production lines are operational and capable of high-volume output. Production and Supply ConsiderationsAOI's automated production lines, developed over several years, support high-volume manufacturing, which is critical for meeting year-end shipment targets. The company remains on track to fulfill its 800G ramp, contributing significantly to quarterly revenue and aligning with hyperscaler deployment schedules.

Market Outlook

The broader 800G optics market is expected to continue growing, with shipments projected to exceed 200,000 ports by 2026 and prices gradually declining as volume increases. This growth is supported by AI-driven demand and the transition to higher-bandwidth coherent optics, ensuring that delivery schedules remain a key focus for suppliers and customers alike. Summary: For AOI 800G optical transceivers, initial deliveries are underway in Q2 2026, with full completion of major orders expected by the end of 2026, reflecting both strong market demand and production readiness.

Article Content

AOI Receives New Order for 800G Data Center Transceivers from

“Our customers are adopting 800G not just for capacity and performance, but to manage long-term operating costs. Deploying 800G now helps to prevent network bottlenecks, improves

Applied Optoelectronics wins $71M 800G order | AAOI

When does AAOI expect to deliver the initial and new 800G orders (AAOI)? AAOI expects to begin delivering both the initial order and the additional

POET Technologies Inc.

POET Infinity is a line of 400G optical engines that can be configured in a daisy-chain architecture to provide customers with 800G, 1.6T and beyond designs. For this particular module

AOI Receives New Upsized Order for 800G Data Center Transceivers

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

AscentOptics Achieves Volume Delivery of 400G and 800G Optical

AscentOptics begins mass delivery of 400G and 800G optical modules, supporting global CSPs and AI infrastructure with high-bandwidth connectivity.

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AOI Receives First Volume Order of 800G Data Center ...

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AAOI Applied Optoelectronics Inc AOI Receives New Order for 800G Data Center Transceivers from Major Hyperscale Customer

POET Technologies Receives $5 Million Production Order for 800G

POET Infinity is a line of 400G optical engines that can be configured in a daisy-chain architecture to provide customers with 800G, 1.6T and beyond designs. For this particular module maker, POET is

AOI Receives First 800G Volume Order From Major Hyperscaler

“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.

The Most Comprehensive Guide Of Optical Modules

PAM4 modulation Classification by transmission distance Classification by mode of operation of optical interfaces Duplex fiber BiDi fiber

Pluggables, Power, and Geopolitics: Mapping the 800G and 1.6T Optical ...

Pluggables, Power, and Geopolitics: Mapping the 800G and 1.6T Optical Transceiver Battle How AI Demand Is Reshaping Market Share, Supply Chains, and Valuations.

Advanced Optical Modules Market in Saudi Arabia | Report

The Saudi Arabia Advanced Optical Modules market comprises active and passive photonic components—transceivers, optical amplifiers, wavelength-selective switches, and

Optical Components

Report Overview: Provides quarterly corporate revenue market share by end-market segment and quarterly shipment numbers for select optical components. Revenue-based market

Optical Communication and Networking Market, 2035 Report

The optical communication and networking market was valued at USD 35.6 billion in 2025 and is expected to grow at a CAGR of 8.3% from 2026 to 2035, driven by accelerating global digitalization

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Fiber Optic Amplifiers Market Forecast Points Higher Toward 2035

Fiber optic amplifiers—primarily erbium-doped fiber amplifiers (EDFAs), Raman amplifiers, and semiconductor optical amplifiers (SOAs)—are critical components in long-haul, metro,

Optical Transceiver Market Size, Share, and Trends Analysis 2032

The global Optical Transceiver market size was estimated at USD 13.08 Billion in 2024 and is estimated to grow at a CAGR of 15.41% from 2025 to 2032.

Optical Transport Network (OTN) Explained: The Ultimate Guide to

In today''s hyper-connected digital economy, global networks must transport ever-growing volumes of data with speed, security, and reliability. At the heart of this ecosystem lies the

Know Your 800G Transceiver | Juniper Networks

800 Gigabit (800G) transceivers are optical modules capable of handling data rates of 800 Gbps. With a transmission rate of up to 800 Gbps, 800G transceivers offer double the capacity of their latest

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This document is for preliminary research. Verify specifications against current standards, product documentation and project requirements.

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