

The Silent Commission: What Each Aggregator Order Really Costs You



By **Diego F. Parra** · Updated 2026-07-09 · Dark Kitchens & Foodtech

MASTERRESTAURANT®

Executive brief

The Silent Commission: What Each Aggregator Order Really Costs You

Method proven in 8,400+ restaurants · 43 countries

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QUICK VERDICT

The commission on your contract (25%–30%) is not your real cost: it's the starting line. Once you add the plate's food cost, the premium packaging delivery demands, the in-app advertising you need to stay visible, and the peak-hour operational overhead, an aggregator order eats 55% to 70% of the ticket before touching rent and payroll. The mistake I see over and over: the owner celebrates Rappi volume while contribution margin per order drops to single digits. The strategic decision isn't 'delivery yes or no', but which dishes and virtual brands survive that cost structure and which are silently bleeding you dry.



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Delivery is no longer a marginal channel; it's revenue infrastructure: the global delivery app market hit USD 110 billion in 2024 (+15.5%) per Business of Apps (2025), and China alone projects USD 539.87 billion in food delivery revenue for 2026 per Statista (2026).

That growth has an owner: the aggregators. Their commission, packaging, and in-app advertising model shifts cost variability onto the restaurant. The 2026 executive question isn't how much you sell on Rappi or iFood, but how much you keep per order after subtracting everything.

This brief breaks down the real delivery unit economics with sector figures cited to their source, and maps the decision architecture so the digital channel adds EBITDA instead of eroding it.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	AGGREGATOR ORDER (28% COMMISSION)	ORDER MANAGED WITH MR ARCHITECTURE
Visible commission on ticket	✗ 25%–30%	✓ 25%–30% (negotiated by volume/mix)
Plate food cost	✗ 32%–38% (over the max)	✓ ≤32% (menu engineering applied)
Premium delivery packaging	✗ 6%–9% of ticket	✓ 3%–5% (optimized SKU)
In-app advertising for visibility	✗ 5%–12% extra	✓ 3%–6% (daypart segmented)
Contribution margin per order	✗ 5%–15% (fragile)	✓ 22%–30% (protected)
Channel break-even	✗ Blurred / unmeasured	✓ Calculated per virtual brand
Single-aggregator dependency	✗ High (territory risk)	✓ Diversified + direct channel

1. How much does each aggregator order really cost you?

The contract commission (25%–30%) is the starting point, not the real cost: once you add food cost, premium packaging, in-app advertising, and the operational surcharge of the rush, the order can consume more than half the ticket.

Delivery is now revenue infrastructure, not a marginal channel: the global delivery app market hit USD 110 billion in 2024 (+15.5%) per Business of Apps (2025). The problem isn't selling; it's whether margin survives. I see it in dozens of digital menus: the owner watches the dollars coming in from Rappi or iFood, not the contribution margin per order. If your dish carries a 30% food cost, commission takes another 28%, and packaging 5%, you're already at 63% before touching in-app advertising. The executive question for 2026 isn't how much you bill on the aggregator: it's how much you keep per order after subtracting everything.

2. Commission is only the first deduction, not the last

The visible 25%–30% commission is merely the first cut in a cascade that is rarely modeled in full. In practice, each order stacks: aggregator commission, dish food cost, transport-ready packaging (premium in delivery, not optional), in-app advertising to avoid sinking to the bottom of the listing, and the operational surcharge of the

peak —overtime, waste, and errors when the kitchen saturates—. That stacking is exactly what fuels the platforms' business: DoorDash's marketplace GOV closed Q4 2024 at USD 21.3 billion, +21% per DoorDash (Q4 and Full Year 2024). Their growth is your cost variability. The mistake I see over and over is treating commission as the total cost; the total cost is the sum of the cascade. A dish that leaves a 68% gross margin in the dining room can drop to 12% through the same digital channel if nobody ran the math order by order.

3. The real KPI isn't commission: it's contribution margin per order

The KPI that decides whether delivery adds or drains EBITDA is contribution margin per order, not the commission percentage. Contribution margin = dish price – (food cost + commission + packaging + prorated advertising fee). That number, not gross sales, tells you which orders are worth pushing. The market won't shrink: China projects USD 539.87 billion in food delivery revenue in 2026 per Statista (2026), and Mexico's online delivery alone reached USD 9.22 billion in 2024 (CAGR 14.66%) per Statista (2024). With that demand, the risk isn't lacking volume: it's having volume without margin. In the Masterrestaurant method we measure each digital SKU by its contribution in dollars, not in percentage: a dish with an 8% margin but USD 4 of contribution can beat one at 20% that leaves USD 1.50. Push the dollars that remain, not the percentage that looks pretty. A profitable digital menu is designed with delivery menu engineering; you don't list the dining-room menu with food cost out of control.

4. Design a delivery-specific menu, don't clone the dining room

The dish that travels 25 minutes, is served in packaging, and competes on price in an app is not the same one that goes straight to the table. Diego F. Parra puts it plainly: in delivery, the expensive ingredient that doesn't survive transport is money you pay twice. Dark kitchen logic already moves serious capital: the cloud kitchen market projects USD 83.5 billion in 2026, CAGR 9.7% to 2034 per Fortune Business Insights (2026), and Mexico alone added USD 1.1 billion in 2024, CAGR 10.74% toward 2033 per IMARC Group (2024). The cash rule is hard: dish food cost $\leq$ 32% as a maximum, never as a target. Redesign portions, packaging, and price so contribution survives the commission; if a dish can't withstand the digital channel, it doesn't belong on the digital menu. Every virtual brand must be measured by its own break-even point, not by the operation's average.

5. Every virtual brand has its own break-even point

Launching three ghost brands from one kitchen sounds like leveraging assets, but if you don't separate costs per brand, some add EBITDA while others bleed silently under the consolidated figure. Market appetite is real and regional: Asia-Pacific ghost kitchens were worth USD 21.73 billion in 2024, heading to USD 60.59 billion in 2032 (CAGR 12.8%) per Coherent Market Insights (2024); Spain recorded USD 928.22 million in ghost kitchens in 2023 per Expert Market Research (2024). In the Masterrestaurant method each virtual brand carries its own food cost, commission, in-app advertising, and kitchen proration, and is required to cover its break-even. The one that doesn't reach its break-even point is corrected or closed; it isn't hidden behind the one that works. Consolidating without breaking down is how a channel that 'grows' makes you poorer. Reducing territory risk demands diversifying aggregators and building direct ordering, because depending on a single app means handing your margin and your data to a third party.

6. Diversify aggregators and build your own channel

The direct channel has better unit economics by design: without the 25%–30% commission, the same sale leaves far more contribution margin. The size of the pie justifies fighting for it: Brazil moved close to USD 18.8 billion in online delivery in 2024, the largest in Latin America per Statista (2024), and Colombia USD 1.18 billion

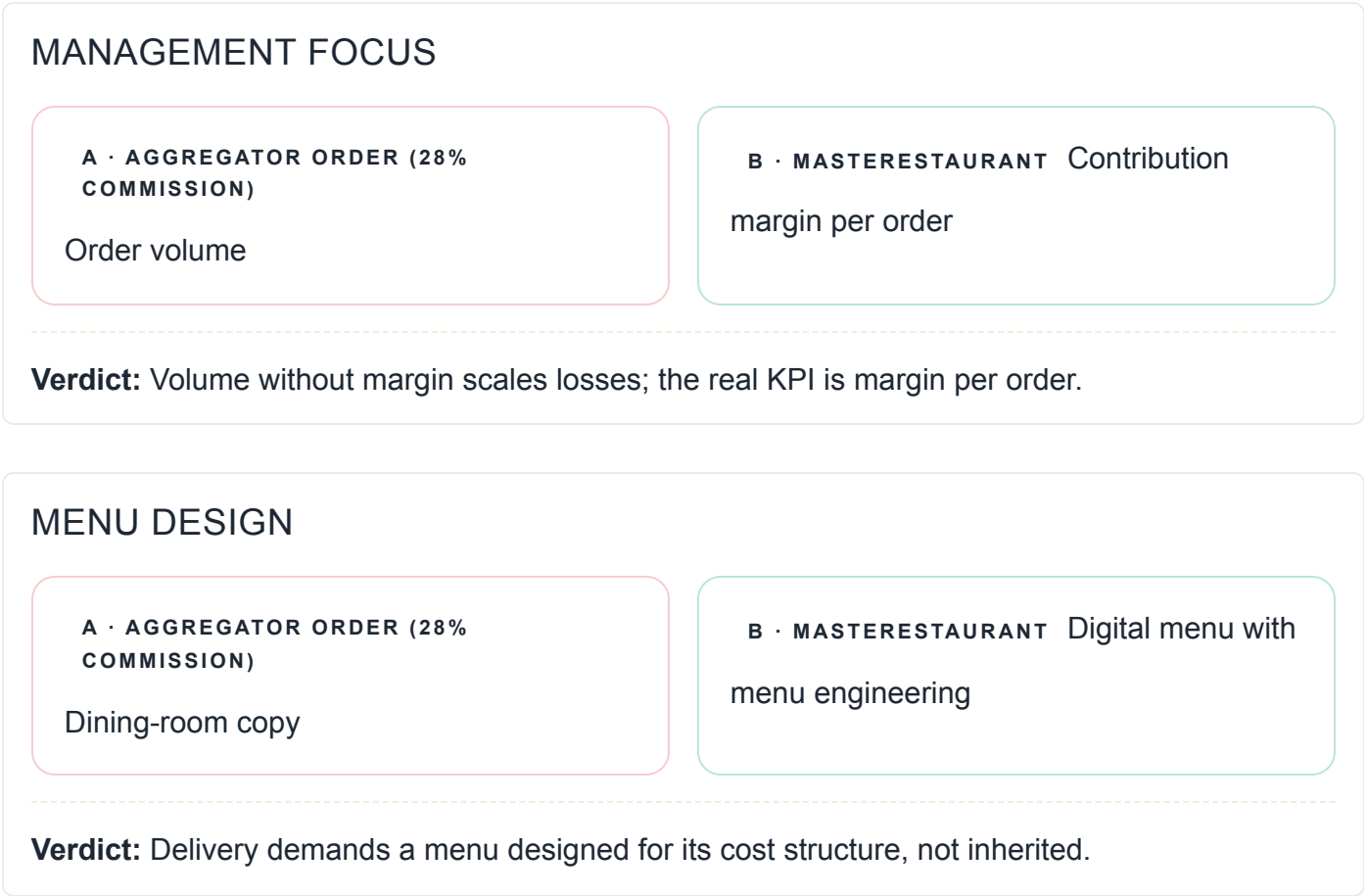
in 2024, CAGR 7.32% (2024-2029) per Statista Market Insights (2024). The concrete action: use aggregators to discover demand and capture new customers, but migrate the recurring ones to your direct ordering with incentives that cost less than the commission you save. A customer who orders through your own channel twice a month already pays their acquisition cost; the rest is margin the platform used to keep. Diversify channels the way you diversify suppliers: so you're hostage to none. You stop treating commission as the cost and start treating contribution margin per order as the real KPI.

7. What changes when you govern delivery unit economics

You design a delivery-specific digital menu (menu engineering) instead of listing the same dining-room dishes with out-of-control food cost. You measure each virtual brand against its own break-even: you discover which add EBITDA and which bleed you silently. You reduce territory risk by diversifying aggregators and building a direct channel (direct orders with better unit economics).

POINT BY POINT

Decision architecture: naive delivery vs. governed delivery



PACKAGING

A · AGGREGATOR ORDER (28% COMMISSION)

Premium un-optimized (6%–9%)

B · MASTERRESTAURANT Optimized SKU

(3%–5%)

Verdict: Packaging is a governable cost center, not a fixed expense.

CHANNEL DEPENDENCY

A · AGGREGATOR ORDER (28% COMMISSION)

Single aggregator

B · MASTERRESTAURANT Mix + direct

channel

Verdict: Diversifying mitigates territory risk and improves unit economics.

SIDE-BY-SIDE COMPARISON

The delivery channel without architecture RISK

- ✗ Commission + packaging + advertising unmeasured per order
- ✗ Same dining-room menu, food cost over 32%
- ✗ Volume that grows, contribution margin that falls
- ✗ Total dependency on one aggregator (territory risk)

The delivery channel with governed unit economics MASTERESTAURANT

- ✓ Total cost per order calculated before listing the dish
- ✓ Digital menu designed for margin, not copied from the room
- ✓ Virtual brands measured one by one against their break-even
- ✓ Channel mix that reduces single-aggregator risk

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THE NUMBERS THAT MATTER

The size of the bet: delivery figures for 2026

110000

M USD

Global delivery app market in 2024 (+15.5%)

539.87

B USD

Projected food delivery revenue in China in 2026

21.3

B USD

DoorDash Marketplace GOV in Q4 2024 (+21%)

9.22

B USD

Online delivery market in
Mexico in 2024 (CAGR 14.66%)

1.18

B USD

Online delivery market in
Colombia in 2024 (CAGR 7.32%)

83.5

B USD

Cloud kitchen market 2026 (CAGR 9.7% to 2034)

VISUALIZATION

The numbers, visualized

Projected food delivery revenue in China in 2026



DoorDash Marketplace GOV in Q4 2024 (+21%)



Online delivery market in Mexico in 2024 (CAGR 14.66%)



Online delivery market in Colombia in 2024 (CAGR 7.32%)



Cloud kitchen market 2026 (CAGR 9.7% to 2034)



Sources: [Business of Apps 2025](#) · [Statista 2026](#) · [DoorDash 2025](#) · [Statista 2024](#) · [Fortune Business Insights 2026](#)

Chart by masterrestaurant.com

REAL CASE

“A steakhouse running three virtual brands on Rappi was celebrating 900 orders a month. When we broke down the average order, two of the three brands had single-digit contribution margin: the dining-room food cost copied as-is, un-optimized premium packaging, and in-app advertising eating another 9%. We shut one brand down, redesigned the digital menu of the other two with menu engineering, and cut food cost to 30%. Same volume, channel contribution margin from 8% to 24% in eleven weeks. Volume was never the problem; the cost architecture was.”

— Diego F. Parra, Masterrestaurant

HOW TO APPLY IT IN YOUR RESTAURANT

Strategic roadmap: three phases to protect your delivery margin

1 Phase 1 — Unit economics due diligence (week 1–2)

Deliverable: total-cost-per-order breakdown for every dish and virtual brand (commission + food cost + packaging + in-app advertising + peak overhead). Success metric: 100% of the digital menu with contribution margin per order calculated and channel break-even defined.

2 Phase 2 — Digital menu redesign (week 3–6)

Deliverable: delivery-specific menu with menu engineering, food cost $\leq 32\%$ per dish, and optimized packaging SKU. Success metric: raise average contribution margin per order by at least 8 percentage points without sacrificing average ticket.

3 Phase 3 — Diversification and direct channel (week 7–12)

Deliverable: territory-risk mitigation with a second aggregator and a direct-order channel. Success metric: cut dependency on the lead aggregator below 60% of orders and lift delivery-channel EBITDA to double digits.

FAQ

Decision-maker questions

What does an aggregator order really cost in 2026?

Between 55% and 70% of the ticket before rent and payroll. The visible commission (25%–30%) is only the start: add plate food cost, premium packaging, in-app advertising, and peak overhead. Contribution margin per order often lands in single digits if left ungoverned.

Should I open a ghost kitchen from scratch or sell on Rappi with my dining room?

It depends on your unit economics, not on the trend. The cloud kitchen market for 2026 is projected at USD 83.5 billion per Fortune Business Insights (2026), but profitability isn't market size: first calculate contribution margin per order for each virtual brand and its break-even.

What does it cost to NOT govern delivery costs?

It costs scaling losses. Every order with negative contribution margin multiplies by the aggregator's volume, and the delivery app market grows double digits (+15.5% in 2024 per Business of Apps, 2025). Growing without cost architecture accelerates the bleed.

How do I reduce aggregator commission?

Commission is managed with volume, mix, and negotiation, not eliminated. What's decisive is cutting total cost per order with menu engineering, optimized packaging, and segmented advertising, and diversifying channels to mitigate the territory risk of depending on a single aggregator.

DATA & SOURCES

Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Penetración segmento meal delivery 2026	29.2% de penetración de usuarios en 2026; 2.6 mil millones de usuarios al 2031	Statista 2026
Mayor mercado de delivery (China) 2026	USD 539.87 mil millones de ingresos en China en 2026	Statista 2026
Delivery en línea América Latina 2027	Segmento meal delivery superará USD 39 mil millones en 2027	Statista 2024
Mercado delivery en línea América Latina 2024	USD 12,917.3 millones en 2024; CAGR 8.6% (2025-2030)	Grand View Research 2025
Modelo plataforma-a-consumidor en LatAm	80.07% de participación de ingresos en 2024	Grand View Research 2025
Usuarios de delivery en línea LatAm 2026	147.0 millones de usuarios en 2026	Statista 2024