Executive Briefs

The Silent Commission: What Each Aggregator Order Really Costs You

By **Diego F. Parra** · Updated 2026-09-27 · Dark Kitchens & Foodtech

QUICK VERDICT

The commission on your contract 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 most 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 keeps growing at double digits, 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

Aggregator commission: side-by-side comparison

	AGGREGATOR ORDER (COMMISSION AT THE TOP OF THE RANGE).	ORDER MANAGED WITH MR ARCHITECTURE
Visible commission on ticket	✕ A commission in the upper band.	✓ Higher commission tier, negotiated by volume and mix
Plate food cost	✕ Well above the cap (over the max).	✓ ≤32% (menu engineering applied)
Premium delivery packaging	✕ A modest share of the ticket.	✓ Low share of orders (optimized SKU)
In-app advertising for visibility	✕ Extra commission on top of the base rate	✓ Moderate share of orders (daypart segmented)
Contribution margin per order	✕ Thin margin (fragile)	✓ Healthy margin (protected)
Channel break-even	✕ Blurred / unmeasured	✓ Calculated per virtual brand
Single-aggregator dependency	✕ High (territory risk)	✓ Diversified + direct channel

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

The contract commission 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 has grown at double digits year after year. 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 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 healthy gross margin in the dining room can shrink to a sliver 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). With that demand, the risk isn't lacking volume: it's having volume without margin.

In the Masterestaurant method we measure each digital SKU by its contribution in dollars, not in percentage: a dish with a thin margin but a solid dollar contribution can beat one with a higher percentage that leaves almost nothing per order. Push the dollars that remain, not the percentage that looks pretty.

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

A profitable digital menu is designed with delivery menu engineering; you don't list the dining-room menu with food cost out of control. 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 is projected at USD 248.1 billion by 2035 per Precedence Research (2025). The cash rule is hard: dish food cost ≤ 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.

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

Every virtual brand must be measured by its own break-even point, not by the operation's average. 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 Masterestaurant 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.

6. Diversify aggregators and build your own channel

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. The direct channel has better unit economics by design: without the commission the aggregator keeps, the same sale leaves far more contribution margin.

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.

7. What changes when you govern delivery unit economics

You stop treating commission as the cost and start treating contribution margin per order as the real KPI. 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

MANAGEMENT FOCUS

A · AGGREGATOR ORDER (COMMISSION AT THE TOP OF THE RANGE).	B · MASTERESTAURANT
Order volume	Contribution margin per order

Verdict: Volume without margin scales losses; the real KPI is margin per order.

MENU DESIGN

A · AGGREGATOR ORDER (COMMISSION AT THE TOP OF THE RANGE).

Dining-room copy

B · MASTERESTAURANT Digital menu with menu engineering

Verdict: Delivery demands a menu designed for its cost structure, not inherited.

PACKAGING

A · AGGREGATOR ORDER (COMMISSION AT THE TOP OF THE RANGE).

Premium listing without optimization (the highest commission)

B · MASTERESTAURANT Optimized SKU (the lowest commission)

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

CHANNEL DEPENDENCY

A · AGGREGATOR ORDER (COMMISSION AT THE TOP OF THE RANGE).

Single aggregator

B · MASTERESTAURANT 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 the cap.
- ✕ 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

THE NUMBERS THAT MATTER

The size of the bet: delivery figures for 2026

539.87
B USD
Projected food delivery revenue in China in 2026

21.3
B USD
DoorDash Marketplace GOV in Q4 2024 (+21%)

473.49
BILLION USD
US online food delivery revenue 2026

6.51
BILLION USD
LatAm online food-delivery market size

430
MILLION USD
UAE cloud kitchen market

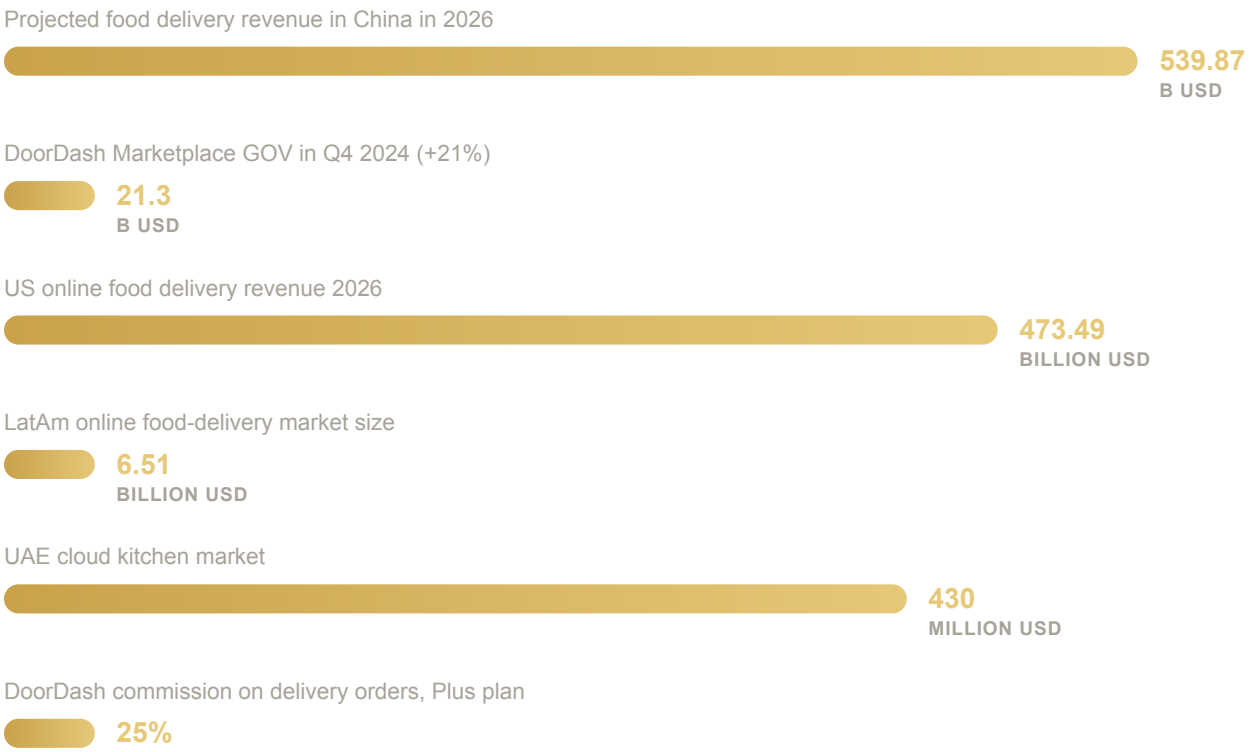
25%
DoorDash commission on delivery orders, Plus plan

248.1
BILLION USD
Cloud kitchen market by 2035

approx. 5
BILLION USD
Spain food delivery & dark kitchens market

VISUALIZATION

The numbers, visualized



Sources: Statista 2026 · DoorDash 2025 · IMARC Group / Informes de Expertos: Online food delivery market, Latin America 2024 · Coherent Market Insights 2025 · DoorDash for Merchants — DoorDash Commission Rates & Pricing (consultado 2026)

Chart by masterestaurant.com

ILLUSTRATIVE CASE (COMPOSITE)

“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, Masterestaurant

Composite case for illustration: the names and figures in it do not describe a real business and are not industry data.

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 ≤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 (final weeks of the plan).**
   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

How do third-party delivery app commissions affect restaurants?

They cut margin on every order, and more than the headline rate suggests, because the commission is charged on the full ticket while the restaurant's profit is only a small slice of it. DoorDash charges 25% on delivery orders under its Plus plan (DoorDash for Merchants); promotions, packaging, card fees and menu-price adjustments come on top. The silent cost is also strategic: the platform keeps the customer data and the repeat relationship. Diego F. Parra's Masterestaurant method calculates the real cost per order, commission, fees, packaging and discounts, and compares it with each dish's contribution margin before deciding prices, delivery menu and which orders to move to a first-party channel.

What does an aggregator order really cost in 2026?

Most of the ticket is gone before rent and payroll. The visible commission 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 keeps growing worldwide, 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 keeps growing at double digits. 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

Aggregator commission by the numbers (2026)

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

Metric	Value	Source
Fees that delivery apps charged New York City merchants as a percentage of order subtotals (Jan-Mar 2024)	**19,3 % del subtotal (primer trimestre de 2024)**	NYC Department of Consumer and Worker Protection — Restaurant Delivery App Data: January-March 2024 (2024)
Average order subtotal on third-party delivery apps in New York City (Jan-Mar 2024)	**28,12 USD por pedido (primer trimestre de 2024)**	NYC Department of Consumer and Worker Protection — Restaurant Delivery App Data: January-March 2024 (2024)
Average consumer fees per delivery paid to delivery apps in New York City (Jan-Mar 2024)	**7,26 USD por entrega (primer trimestre de 2024)**	NYC Department of Consumer and Worker Protection — Restaurant Delivery App Data: January-March 2024 (2024)
Weekly total fees that New York City merchants paid to delivery apps, in millions of dollars (Jan-Mar 2024)	**15 millones de USD por semana (primer trimestre de 2024)**	NYC Department of Consumer and Worker Protection — Restaurant Delivery App Data: January-March 2024 (2024)
Weekly deliveries completed by third-party delivery apps in New York City (Jan-Mar 2024)	**2,77 millones de entregas por semana (primer trimestre de 2024)**	NYC Department of Consumer and Worker Protection — Restaurant Delivery App Data: January-March 2024 (2024)
Upper end of the range of delivery commissions that delivery apps charge restaurants in Mexico, as a share of total sales, according to CANIRAC's president (2026); the stated range is 15%-35%	**15 a 35 % del total de las ventas (2026)**	El Universal San Luis — Comisiones de hasta el 35 por ciento en apps de reparto, el principal reto para restaurantes: CANIRAC (2026)

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