

# The Procurement Gap

Executive Brief | BuildVision Research | April 2026

**\$7.3B**

Addressable procurement volume across 15 GCs

**3-8%**

Margin capture range on direct equipment procurement

**6**

Procurement programs launched 2023-2025

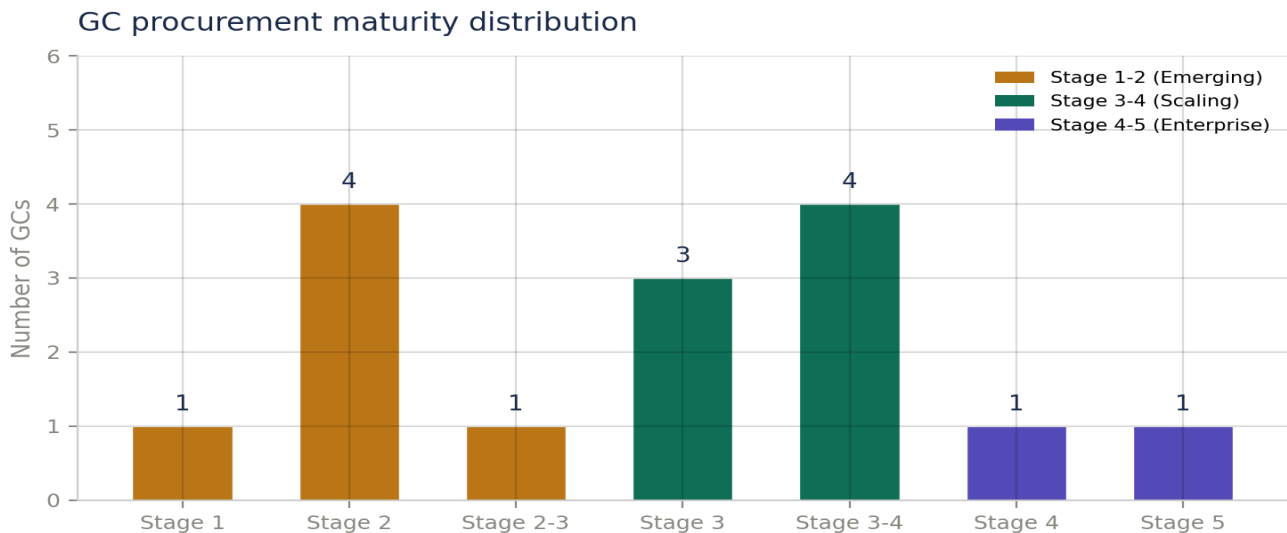
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Projects covered by a 10-person team with / without infrastructure

## The thesis

Procurement centralization among enterprise GCs has crossed an inflection point. The contractors who built procurement infrastructure in 2023-2025 are compounding advantages in margin capture, OEM relationships, and data assets that late movers cannot replicate on the same timeline. Three forces are driving this: mission critical spend concentration (data center construction up 340% since 2019), a talent pipeline flowing from Turner/SourceBlue to competitors, and OEM channel economics that increasingly favor corporate accounts.

## Where the market sits



Source: BuildVision GC Procurement Maturity Landscape. 15 enterprise GCs, \$114B combined revenue.

## Why programs stall

Getting from Stage 1 to Stage 2 is a hiring decision. Getting from Stage 2 to Stage 3 is a systems decision. Most programs stall because equipment decisions happen project by project with no portfolio visibility, no workflow enforcement of preferred vendor relationships, and no structured data compounding across projects. The constraint is not headcount. It is data infrastructure.

## The Turner talent tree

Two of the most significant procurement program launches in 2025 were led by Turner/SourceBlue alumni: Louis Martinelli (now heading Suffolk's Freedom Source, ex-SourceBlue with 15 years at Trane) and Suzanne Bennett (now VP at Gilbane's NextDirect, former Turner national supply chain manager). SourceBlue employs 250-300 people. The talent pipeline is replicating Turner's playbook industry-wide.

## The five stages of GC procurement maturity

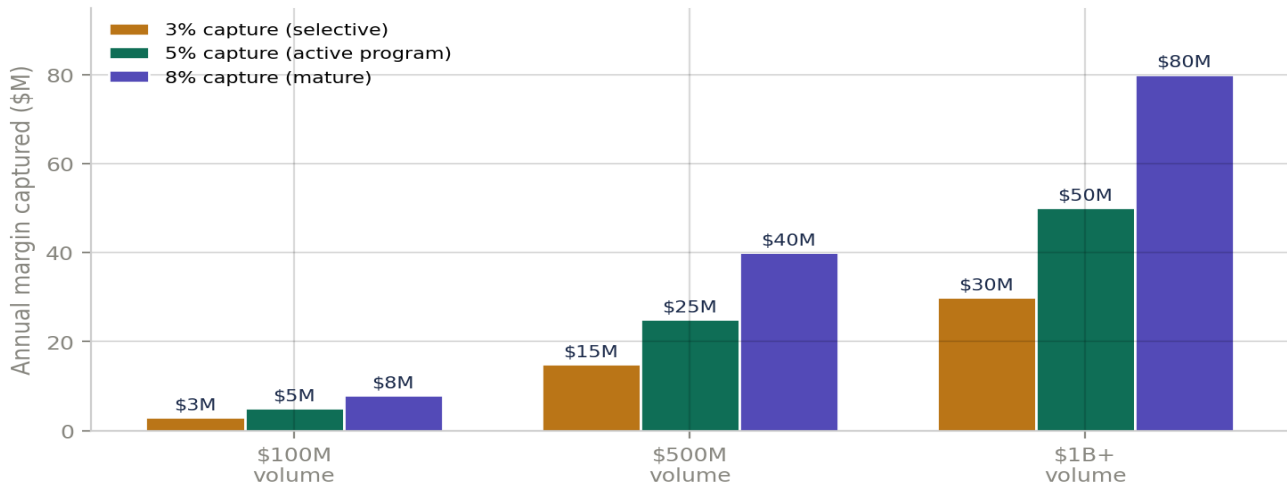
Stage	Archetype	Team	Key signal	GCs in sample
1	Decentralized	0	PMs make all equipment decisions	JRM
2	Emerging	2-10	Director of Purchasing hired; building business case	Suffolk, Clayco, Shawmut, Consigli, Hunter Roberts
3	Scaling	10-25	Active OEM programs; seeking technology partners	Gilbane, JE Dunn, McCarthy, STO
3-4	Federated	20-200 +	National accounts; partial system integration	DPR, Mortenson, Holder, Kiewit
5	Enterprise	250+	Standalone subsidiary; \$1B+ annual volume	Turner/SourceBlue

## Two futures

**Scenario A: Acceleration continues.** By 2028, 25-30 of the ENR 100 have Stage 3+ procurement. Margin gap shows up in fee proposals. Owners ask about procurement capability during selection.

**Scenario B: Most stall at Stage 2.** Turner and 3-4 early movers pull further ahead. The gap between Stage 5 and Stage 2 becomes permanent.

### Margin capture potential by procurement volume and maturity



Annual margin captured by procurement volume and maturity level.

### Assess your procurement maturity.

BuildVision's Preliminary Procurement Diagnostic is a two-week engagement that establishes a baseline maturity score, estimates your addressable equipment spend, and benchmarks your position against the GCs in this report. The diagnostic fee is credited in full if you proceed to a full assessment.

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