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Multilocus species identification and fungal DNA barcoding: insights from blue stain fungal symbionts of the mountain pine beetle



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Roe et al. – Fungal Barcoding
January 8, 2010

1

1 Title: Multilocus species identification and fungal DNA barcoding: insights from
2 blue stain fungal symbionts of the mountain pine beetle

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22
23 Running Title: Fungal DNA barcoding

24
25 Abstract:

26 There is strong community-wide interest in applying molecular techniques to
27 fungal species delimitation and identification, but selection of a standardized
28 region or regions of the genome has not been finalized. A single marker, the
29 ribosomal DNA internal transcribed spacer region (ITS), has frequently been
30 suggested as the standard for fungi. We used a group of closely related blue
31 stain fungi associated with the mountain pine beetle (*Dendroctonus ponderosae*
32 Hopkins) to examine the success of such single locus species identification,
33 comparing ITS to four other nuclear markers. We demonstrate that single loci
34 varied in their utility for identifying the six fungal species examined, while use of
35 multiple loci was consistently successful. In a literature survey of 21 similar
36 studies, individual loci were also highly variable in their ability to provide

Roe et al. – Fungal Barcoding
January 8, 2010

2

37 consistent species identifications and were less successful than multilocus
38 diagnostics. Accurate species identification is the essence of any molecular
39 diagnostic system and this consideration should be central to locus selection.
40 Moreover, our study and the literature survey demonstrate the value of using
41 closely related species as the proving ground for developing a molecular
42 identification system. We advocate use of a multilocus barcode approach that is
43 similar to the practice employed by the plant barcode community, rather than
44 reliance on a single locus.

For Review Only

45 **Introduction**

46 Accurate species identification and delimitation is vital to understanding
47 our natural world. Errors can have far-reaching consequences, impacting
48 biodiversity assessment, ecological studies, and management decisions
49 (Bortolus 2008). Less than 10% of an estimated 1.5 million fungal species have
50 been described (Hawksworth 2001), impeding our understanding of fungal
51 diversity and ecology. Closely related fungi can differ in their pathological
52 effects, toxicogenic products, beneficial attributes, and ecological niches (Bleiker
53 & Six 2007; Degenkolb *et al.* 2007; Lee *et al.* 2006b). Morphological identification
54 of such closely related fungi has remained elusive due to the scarcity and
55 ambiguity of diagnostic characters. Furthermore, morphology-based
56 identifications are impossible for many species since they cannot be cultured.

57 To counter difficulties in identification, use of DNA sequences has become
58 increasingly popular for species delimitation and identification (e.g. Anderson &
59 Cairney 2007; Giraud *et al.* 2008; Shenoy *et al.* 2007), allowing for the
60 application of genealogical concordance phylogenetic species recognition (Taylor
61 *et al.* 2000). Various diagnostic tools based on sequence variation have been
62 developed for important groups of fungi (Druzhinina *et al.* 2005; Geiser *et al.*
63 2004; Kopchinskiy *et al.* 2005), but lack standardization. DNA barcoding (Hebert
64 *et al.* 2003) is a currently common sequence-based approach that generally uses
65 a single standard region of DNA to identify and recognize distinct animal species,
66 but has received a wide range of responses among taxonomists (Janzen 2004;
67 Sperling 2003; Tautz *et al.* 2002; Will *et al.* 2005)

Roe et al. – Fungal Barcoding
January 8, 2010

4

68 Although there is now wide acceptance of the need for standardization of
69 gene regions used in taxonomic studies (Caterino *et al.* 2000), it has proven
70 more difficult to determine which particular gene regions and sequence length
71 are most informative (Roe & Sperling 2007a, b; Rubinoff *et al.* 2006). Initially, a
72 658 bp segment of mitochondrial DNA from the cytochrome c oxidase gene
73 (COI) was proposed as the single standard DNA barcoding region (Hebert *et al.*
74 2003). However, it has been demonstrated that COI is suboptimal for some
75 groups of organisms, including fungi (Seifert 2009; Seifert *et al.* 2007) and plants
76 (Chase *et al.* 2005). To develop a standardized molecular identification system
77 like DNA barcoding in these groups, other genomic regions have been explored
78 and suggested in place of COI (CBOL Plant Working Group *et al.*, 2009;
79 Rossman 2007; Seifert 2009). Recently, application of DNA barcoding to fungi
80 figured prominently in a special issue in Molecular Ecology Resources, including
81 by Seifert (2009) who encouraged adoption of the internal transcribed spacer
82 regions 1 and 2 (ITS) as the standard fungal DNA barcoding gene region.

83 Accurate species identification is the essence of any molecular diagnostic
84 system (Erickson *et al.* 2008) and potential genomic regions should be tested
85 rigorously prior to adoption in a standardized system. Using five independent
86 gene regions (elongation factor 1 alpha, beta tubulin, actin, internal transcribed
87 spacer 2 + 28S rDNA, and an anonymous nuclear locus), we examine the
88 accuracy of each marker and combination of markers for species delimitation and
89 identification in ophiostomatoid fungi associated with the mountain pine beetle
90 (MPB; *Dendroctonus ponderosae* (Hopkins)). MPB is an eruptive forest pest,

Roe et al. – Fungal Barcoding
January 8, 2010

5

91 attacking and feeding on pines across western North America. Western Canada
92 is experiencing the largest outbreak on record, with over 7.8 million hectares of
93 lodgepole pine (*Pinus contorta* Douglas var. *latifolia* Engelmann) and lodgepole x
94 jack pine hybrid (*P. contorta* Douglas var. *latifolia* Engelmann x *P. banksiana*
95 Lamb.) forest affected to date (British Columbia Ministry of Forests –
96 www.for.gov.bc.ca/hfp/health/overview/2008table.htm, accessed Sept 01, 2009;
97 Alberta Sustainable Resources Development –
98 <http://www.mpb.alberta.ca/Resources/regionalmaps.aspx>, accessed Oct 16,
99 2009). MPB has several fungal symbionts (Lee *et al.* 2005, 2006a; Robinson
100 1962; Rumbold 1941; Six & Bentz 2003; Whitney & Farris 1970), and we focus
101 on four closely related blue stain fungi (Ophiostomataceae): *Grosmannia*
102 *clavigera* (Robinson-Jeffrey and Davidson) Zipfel, de Beer and Wingfield, *G.*
103 *aurea* (Robinson-Jeffrey and Davidson) Zipfel, de Beer and Wingfield,
104 *Leptographium longiclavatum* Lee, Kim and Breuil, and *L. terebrantis* Barras and
105 Perry, collectively termed the *Grosmannia* clade (Zipfel *et al.* 2006). These fungi
106 can be tree pathogens (Lee *et al.* 2006b; Owen *et al.* 1987; Reid *et al.* 1967; Rice
107 *et al.* 2007; Stobel & Sugarwara 1986), aid in host suppression (Raffa &
108 Berryman 1983), and provide nutrition to the beetle (Adams & Six 2007; Bentz &
109 Six 2006; Six & Paine 1998). Species identification and delimitation in the
110 *Grosmannia* clade is difficult due to interspecific overlap of morphological traits
111 (Lim *et al.* 2004). Previous work on this group of fungi (Alamouti *et al.* 2009; Lee
112 *et al.* 2005; Lim *et al.* 2004; Zipfel *et al.* 2006) has laid the foundation for an in

Roe et al. – Fungal Barcoding
January 8, 2010

6

113 depth exploration of species identification and delimitation in MPB associated
114 fungi using dense spatial and temporal sampling.

115 By comparing multiple independent loci we examined the contribution of
116 independent character sets to the identification and delimitation of blue stain
117 fungi associated with MPB. To relate our results to the larger body of ascomycete
118 literature and assess the success of single- versus multilocus species
119 identification, we surveyed studies that used multiple, independent loci to delimit
120 closely related species. We then contrasted single and multilocus fungal species
121 identification, examining the interaction between increased molecular sampling
122 and successful species identification.

123

124 **METHODS**

125

126 **Field Sampling**

127 Sampling focused on pine stands in areas experiencing recent mountain
128 pine beetle attacks in Alberta and eastern British Columbia (Fig. 1). Collections
129 were made over two time periods: Jan-May 2007 (M001) and Sept 2007-May
130 2008 (M002). A 10 cm hole-saw and chisel were used to obtain pine discs 10 cm
131 in diameter and approximately 3 cm thick, containing both xylem and bark with
132 beetle infested phloem. Discs were placed in ziplock bags and transported to the
133 laboratory on ice for processing.

134

135 **Fungal Culturing**

136 Fungal cultures were obtained, following Rice & Langor (2009), directly
137 from adult and larval MPB individuals or from wood samples taken from beetle
138 galleries. Live individuals were allowed to crawl on malt extract agar (MEA) for up
139 to 24h, while dead individuals were wiped across the surface of the media. Fungi
140 were allowed to grow for 2-5 days at room temperature (RT) and ambient light
141 before subculturing onto MEA. Subcultures were incubated at RT for 2-4 weeks
142 then scored for cultural and microscopic traits and compared to previously
143 authenticated strains by A. Rice and grouped according to colony morphology
144 ('morphotype'). Representative cultures were deposited in the University of
145 Alberta Microfungus Collection and Herbarium (UAMH), with unique identifiers
146 listed in Appendix 1 and images of strains deposited on MorphoBank project
147 number P327 (www.morphobank.org).

148

149 **DNA extraction, PCR, and sequence analysis**

150 Cultures were selected at random for multilocus typing within each
151 collecting locality for each morphotype using a random number generator.
152 Cultures with unusual morphology were also selected for typing. Single spore
153 isolates (SSI) were grown for each selected strain.

154 Fungal tissue (~25 mg) was harvested for DNA extraction from SSI grown
155 on 1.5% MEA covered with a cellophane membrane and ground in liquid
156 nitrogen. DNA was extracted using a CTAB protocol modified from Chang *et al.*
157 (1993). CTAB buffer (700 μ L) was added to each sample, followed by 10 μ L of
158 Proteinase K (600 mAU/mL, Qiagen). Samples were incubated at 65°C for 1 hr,

Roe et al. – Fungal Barcoding
January 8, 2010

8

159 then cooled to room temperature (RT) before adding 600 μ L 24:1 chloroform:
160 isoamyl alcohol. Tubes were mixed vigorously then centrifuged for 5 min (all
161 centrifugation steps performed at 17000 x g and RT). The aqueous supernatant
162 was mixed with 600 μ L isopropanol, and chilled at -20°C for at least 2 hours.
163 Samples were centrifuged for 15 min, supernatants were discarded, then 500 μ L
164 95% ethanol (v/v) added to the pellet, which was vortexed briefly and centrifuged
165 for 3 min. This process was repeated with 500 μ L 70% ethanol (v/v). Pellets
166 were re-suspended in 100 μ L Milli-Q water (Millipore, Billerica MA) with gentle
167 agitation.

168 Five gene regions were amplified: actin, elongation factor 1 alpha (EF1a),
169 beta tubulin (Btub), an anonymous nuclear locus (UFM), and ITS2 (partial 5.8S +
170 internal transcribed spacer 2 + partial 28S). Primers used to amplify the above
171 regions as well as their corresponding PCR profiles are listed in Table 1. Initially,
172 amplification of the ITS region with universal primers resulted in non-specific
173 amplification as well as impediments to sequencing due to poly-A repeats in the
174 ITS1 region. In fact, the UFM locus was obtained as a nonspecific product while
175 trying to amplify ITS2 using primers ITS3+LR3 (Lim *et al.* 2004; Vilgalys &
176 Gonzalez 1990; White *et al.* 1990). ITS2 was eventually specifically amplified
177 using primers ITS3+TW13 (Table 1). The non-ITS identity of the UFM locus was
178 confirmed by comparison with available ITS sequence and alignment with the *G.*
179 *clavigera* genome sequence (whole genome shotgun sequence, GenBank
180 ACXQ01001232.1, contig 29.6, 42669-43146 bp, Diguistini *et al.* 2009). Locus-
181 specific internal primers were then designed to amplify the UFM region (Table 1).

182 PCR reactions for all regions were performed in 25 μ L final volume. Each
183 reaction contained 50 ng DNA, 0.1 μ M of each primer, 1X modified Thermopol
184 buffer (M0273S: New England BioLabs, Pickering ON) with BSA fraction V added
185 to the buffer to give a final concentration of 1 ng/ μ L BSA, 1.25 U Taq DNA
186 Polymerase (New England BioLabs, Pickering ON), 200 μ M each dNTP, 1%
187 DMSO (v/v) and 4 mM MgCl₂. In the case of ITS amplification, 2 mM MgSO₄
188 was used in place of 4 mM MgCl₂.

189 PCR products were purified in 10 μ L reactions using an EXO-SAP
190 reaction with Exonuclease I and Shrimp Alkaline Phosphatase (70073Z and
191 70092Y; USB Corporation, Cleveland OH). Purified PCR products were
192 sequenced with ABI Big Dye Terminator v 3.1 cycle sequencing reaction kit
193 (Applied Biosystems, Foster City CA) and purified using an
194 ethanol/EDTA/sodium acetate precipitation protocol (ABI Big Dye Terminator
195 v3.1 cycle sequencing kit protocol manual, Applied Biosystems). Sequencing
196 was performed on an Applied Biosystems 3730 DNA Analyzer. Initially, all
197 reactions were sequenced bi-directionally to identify common haplotypes.
198 Following the initial survey, reactions were sequenced uni-directionally to
199 streamline data collection, with all new haplotypes confirmed by bi-directional
200 sequencing. Sequence data and associated chromatograms for unique
201 multilocus haplotypes were submitted to GenBank and the NCBI Trace Archive
202 under accession numbers GU370130-GU370344.

203

204 **Phylogenetic Analyses**

205 *Parsimony Haplotype Networks*

206 Sequence data were initially aligned in Sequencher 4.8 (Gene Codes, Ann
207 Arbor, MI) with manual adjustments made by eye. Representative GenBank
208 sequences from previous studies of closely related members of the *Grosmannia*
209 clade (*G. clavigera*, *G. aurea*, *G. robusta*, *L. longiclavatum*, *L. terebrantis*, and *L.*
210 *pyrinum*) were included (Appendix 2). These representatives helped to confirm
211 morphotype identifications and to identify species not diagnosed during
212 morphotyping. Unique haplotypes were determined for each individual locus and
213 a concatenated multilocus data set, and haplotype networks were calculated
214 using TCS 1.21 (Clement *et al.* 2000), which infers a haplotype network using a
215 statistical parsimony framework (Templeton 1998). Gaps were treated as missing
216 data and the connection limit was set to 95%.

217

218 *Neighbor-Joining*

219 Following sequence alignment, a neighbor-joining tree was produced
220 using PAUP* v. 4.0b10 for each gene region and the concatenated multilocus
221 data set. Two additional taxa were used as outgroups (*L. koreanum* Kim and
222 Kim, and *L. yunnanensis* Zhou, Jacobs, Wingfield, and Morelet). Uncorrected “p”
223 distances were used to generate pairwise distances and missing data (including
224 gaps) were distributed proportionally to unambiguous changes.

225

226 *Maximum Likelihood*

227 Following sequence alignment, a maximum likelihood (ML) tree was
228 estimated for each gene region and the multilocus data set. The ML trees were
229 calculated using a maximum likelihood framework as implemented in RaxML v.
230 7.0.4 (Stamatakis 2006) hosted by CIPRES portal v. 1.0 (Cyberinfrastructure for
231 Phylogenetic Research - www.phylo.org/portal/Home.do, accessed June 30,
232 2009). RAxML, or “randomized accelerated maximum likelihood” for high
233 performance computing, uses a simultaneous optimized ML tree-space search
234 method and rapid bootstrapping algorithm (Stamatakis *et al.* 2008) that allows a
235 full ML analysis in a single run. Matrices and associated ML trees for each
236 individual locus and the multilocus data set were submitted to TreeBASE
237 (www.treebase.org; accession number SN4846).

238

239 **Multilocus Power Analysis**

240 To determine whether species identification is improved by the addition of
241 data for multiple genes, we compared the congruence of species limits in single
242 locus data sets to successively larger multilocus data sets. These comparisons
243 were conducted on three data sets that consisted of several closely related
244 individuals which had sequence data for five independent loci: the present study
245 (four species), *Mycosphaerella* (five species, Crous *et al.* 2004), and *Cercospora*
246 (three species, Groenewald *et al.* 2005). For each study, we produced NJ trees
247 for each individual locus, as well as all combinations of two, three, four, and five
248 loci. The average proportion of species identification success was calculated for

249 each combination. Congruence with species limits was scored as in the literature
250 survey below.

251

252 **Literature Survey of Multilocus Species Identification**

253 To relate our study to broader patterns of single locus versus multilocus
254 species identification in the mycological literature, we used the literature survey
255 approach described by Roe and Sperling (2007b). We selected fungal studies
256 that examined at least two independent loci and sampled at least 5 individuals
257 from two closely related species. For inclusion, studies had to provide results
258 from single locus analyses (e.g. phylogenetic or distance trees) either in the
259 publication or in TreeBASE. To summarize each study, loci were grouped into
260 different character classes (ribosomal, mtDNA, autosomal, and unknown), and
261 their haplotype fixation and phylogenetic/cluster congruence were compared to
262 the multilocus species delimitations preferred by the authors. Haplotype fixation
263 was defined as either fixed (species do not share haplotypes) or shared (species
264 share haplotypes). Congruence with species limits was scored based on the type
265 of analysis used. Phylogenetic results (parsimony, likelihood, Bayesian) were
266 scored as reciprocally monophyletic (RM), paraphyletic (PA), or polyphyletic
267 (PO). Distance or cluster-based methods (neighbor-joining) were scored as
268 congruent (CO) or non-congruent (NC) with species limits.

269

270 **RESULTS**

271 **Morphotyping**

272 A total of 5063 strains were isolated, morphotyped, and preserved for future
273 examination from 45 stands in Alberta and eastern British Columbia (Fig. 1).
274 Strains were initially identified as three common MPB fungal associates: *G.*
275 *clavigera* (n=2162), *L. longiclavatum* (n=675), and *Ophiostoma montium*
276 (Rumbold) von Arx (n=1991) based on diagnostic characters from original
277 species descriptions (Lee *et al.* 2005; Robinson-Jeffery & Davidson 1968;
278 Rumbold 1941), as well as via comparisons with previously authenticated strains.
279 Some strains appeared to be morphologically intermediate between *G. clavigera*
280 and *L. longiclavatum* and were identified as 'intermediate' (n=235). A subset of
281 morphotyped strains was selected for multilocus typing.

282

283 **Phylogenetic Analyses**

284 For the remainder of this study, we focused on strains belonging to the
285 *Grosmannia* clade (*G. clavigera*, *L. longiclavatum*, and intermediate strains).
286 *Ophiostoma montium* was clearly genetically divergent from the *Grosmannia*
287 clade, although not always morphologically distinct, and phylogenetic analysis for
288 this species will be reported elsewhere. In total, 350 SSI from the *Grosmannia*
289 clade were selected for multilocus characterization (see Appendix 1 for a
290 complete list of all cultures and collecting localities). In addition to these strains,
291 sequence data were included for six previously published representative species
292 within the *Grosmannia* clade and two outgroup species (Appendix 2).

293 Five loci (actin, EF1a, Btub, UFM, and ITS2) were amplified for all
294 isolates. Unique haplotypes for each locus were selected for phylogenetic

295 analysis, treating insertions and deletions as missing data. For each locus and
296 the combined multilocus data set, parsimony haplotype networks (Figs. 2 and 3),
297 maximum likelihood (ML) and neighbor-joining (NJ) trees (Figs. 4 and 5) were
298 produced. A summary of the phylogenetic data and ML model parameters for
299 each data set is presented in Table 2.

300

301 Single Locus Analyses

302 Generally, similar patterns of tree topology and species limits were found
303 for each locus, with the exception of ITS2. ITS2 had several haplotypes that
304 were shared between species (*L. terebrantis*, *L. pyrinum*, *G. robusta*, and *G.*
305 *aurea*, Fig. 2), while no haplotypes were shared between species for the
306 remaining loci (actin, EF1a, Btub, and UFM). Monophyly of individual species
307 was well supported where species were represented by multiple haplotypes, with
308 the exception of species sharing ITS2 haplotypes. There was no evidence of
309 paralogous ITS copies or interspecific hybridization, suggesting that shared ITS
310 haplotypes resulted from incomplete lineage sorting. *Leptographium terebrantis*
311 was paraphyletic in actin, EF1a, and Btub, and *G. clavigera* was paraphyletic in
312 UFM. While monophyly of individual species was generally well-supported,
313 internal nodes within and between species received little bootstrap support.
314 Monophyly of the *Grosmannia* clade was well supported for each locus (Fig. 4),
315 although this could not be assessed for UFM because sequences were
316 unavailable for outgroup taxa.

317

318 Multilocus Analyses

319 Minimal topological conflict existed among supported clades in each
320 single-locus analysis; accordingly, the five data sets were combined into a single
321 concatenated data set. No haplotypes were shared between species (Fig. 3),
322 similar to the individual loci, although contrasting with the results obtained for
323 ITS2 (Fig. 2). *G. clavigera*, *L. longiclavatum*, *L. terebrantis*, and *G. aurea* were all
324 represented by multiple haplotypes and were monophyletic, with strong support
325 for all except *L. terebrantis*. As with the single locus analyses, internal nodes
326 within and between species received little bootstrap support. Monophyly of the
327 *Grosmannia* clade was also strongly supported by the concatenated data set
328 (Fig. 5).

329

330 **Multilocus Power Analysis**

331 Using three multilocus data sets, including the one from our study, we
332 examined how species identification success changed with the inclusion of
333 additional loci. Based on single loci, average proportion of identification success
334 ranged from 0.4 to 0.7 (40 – 70%) for *Grosmannia*, *Mycosphaerella*, and
335 *Cercospora* species. The proportion of successful identification increased as
336 additional loci were added (Fig. 6). Eighty percent success was attained in the
337 *Grosmannia* data set using as few as two loci, while four loci were needed for
338 both *Mycosphaerella* and *Cercospora*. Furthermore, the addition of more loci
339 resulted in an increase in identification success to 100% in both the *Grosmannia*

340 and *Mycosphaerella* with three and five loci respectively, while *Cercospora* never
341 surpassed 80% success, even with the entire five locus data set.

342

343 **Literature Survey**

344 We obtained multilocus data for 22 closely related species pairs of
345 ascomycetes from 21 studies (Appendix 2). Species pairs occurred in six orders:
346 Ophiosomatales (two pairs), Hypocreales (eight pairs), Capnodiales (five pairs),
347 Calosphaeriales (one pair), Eurotiales (two pairs), Botryosphaeriales (three
348 pairs), and one unplaced Sordariomycetidae genus. This was not an exhaustive
349 review but we believe that it represents the overall patterns in the literature.

350 Results of this survey are summarized in Table 3 and presented in greater detail
351 in Appendix 3. Gene regions examined in the studies fall into 5 major categories:
352 ribosomal (ITS1, 5.8S, ITS2, 28S, intergenic spacer region), mtDNA
353 (mitochondrial small subunit rDNA, adenosine triphosphatase 6), autosomal
354 (actin, beta tubulin, elongation factor 1 alpha, calmodulin, histone H3, RNA
355 polymerase II subunit, chit18-5), anonymous (UFM, BotF15), and amplified
356 fragment length polymorphisms.

357 A total of 77 loci were examined across the studies examined, with two to
358 six loci per species pair (Table 3, Appendix 3). Excluding amplified fragment
359 length polymorphisms, 60 loci showed fixed haplotype differences between
360 species pairs, while 16 loci had shared or partially shared haplotypes between
361 species. All loci with shared or partially shared haplotypes (16 loci) were
362 polyphyletic (PO) or non-congruent (NC). Of the loci with fixed haplotype

363 differences, the majority of haplotypes were reciprocally monophyletic (RM – 28
364 loci) or congruent (C – 22 loci) with species limits. The remaining fixed loci (10
365 loci) were paraphyletic (PA) or non-congruent (NC). Of the surveyed studies, the
366 majority of loci fall into two locus types, ribosomal (20 loci) and autosomal loci
367 (52 loci). Proportion of haplotype fixation was higher in autosomal loci (46 loci -
368 88%), compared to rDNA loci (11 loci - 55%) (Table 3, Appendix 3). Of the loci
369 with fixed haplotype differences, levels of reciprocal monophyly and congruence
370 were similar between autosomal loci (87%) and rDNA loci (82%).

371

372 **DISCUSSION**

373 Accurate identification and delimitation of closely related species should be
374 the proving ground for any diagnostic tool designed to elucidate biodiversity
375 (Hollingsworth 2008; Roe & Sperling 2007b; Sperling 2003). Boundaries
376 between closely related species are often indistinct, lacking clear limits and
377 diagnostic characters (Bickford *et al.* 2007; Sites & Marshall 2004), due to
378 processes such as introgressive hybridization and lineage sorting (Funk &
379 Omland 2003). These evolutionary phenomena can lead to discordance between
380 species limits and diagnostic traits, which are especially problematic - and
381 undetectable - when a single character set is used. Currently many molecular
382 identification approaches, such as DNA barcoding, rely on a single standardized
383 fragment of DNA for species identification, delimitation, and discovery (Hebert *et*
384 *al.* 2003; Rubinoff *et al.* 2006).

385

Roe et al. – Fungal Barcoding
January 8, 2010

18

386 *Single locus delimitation and identification*

387 The ideal barcode identification system recognizes distinct species, has
388 universal primers, and reliably produces high quality sequence (Erickson *et al.*
389 2008). The fungal community is currently working toward a standardized
390 molecular identification system to improve the identification, delimitation, and
391 discovery of cryptic fungal biodiversity. For example, the All Fungi Barcode
392 Initiative (FBI) (Rossman 2007) has promoted the adoption of ITS as the sole
393 fungal barcode region, a recommendation also followed by Seifert (2009). ITS, in
394 many respects, appears to fit the criteria of an ideal molecular marker. Given its
395 successful usage in a range of fungal groups (e.g. Druzhinina *et al.* 2005; Feau
396 *et al.* 2009; Iwen *et al.* 2002; Koljalg *et al.* 2005; Le Gac *et al.* 2007; Seifert *et al.*
397 2007; Shenoy *et al.* 2007; Summerbell *et al.* 2007), universal primers (White *et*
398 *al.* 1990), manageable sequence length, high copy number, and phylogenetic
399 utility (Coleman 2003; Kohn 1992), selecting ITS as the molecular marker for
400 fungi initially seems reasonable.

401 In addition to ITS, other loci have been suggested as potential molecular
402 diagnostic markers. Mitochondrial genes, such as COI, work well for certain
403 groups (Seifert *et al.* 2007; Vialle *et al.* 2009). Since a database of COI
404 sequence already exists for animals (Ratnasingham & Hebert 2007), there is a
405 strong advantage to using the same region to avoid a 'Tower of Babel' (Caterino
406 *et al.* 2000). Single/low copy nuclear genes have also been suggested (Geiser *et*
407 *al.* 2004; Lieckfeldt & Seifert 2000). These types of loci can have a number of
408 advantages, including easier alignment, fewer indels, more variable 3rd codon

409 positions, and known copy number (Bruns & Shefferson 2004). Of these,
410 variability is the most important advantage, as indicated in our literature survey.

411 Despite their various positive attributes, each marker system has potential
412 negative issues and no single marker is perfect. For example, low variability in
413 ITS has resulted in failure to separate closely related species (Appendix 2,
414 Bruns & Shefferson 2004; Crouch *et al.* 2009; Landis & Gargas 2007; Lieckfeldt
415 & Seifert 2000; Varga *et al.* 2007), which is where identifications matter most
416 (Hollingsworth 2008; Sperling 2003). As well, ITS may have multiple paralogous
417 copies (O'Donnell & Cigelnik 1997; Simon & Weiss 2008), leading to inaccurate
418 identifications, or variation in copy number (Pukkila & Skrzynia 1993; Vilgalys &
419 Gonzalez 1990), preventing its use as a quantitative marker. Problems with COI
420 have also been well documented, including problems with multiple paralogous
421 copies (Gilmore *et al.* 2009), low species resolutions, mobile introns, and limited
422 historical usage (for a detailed discussion see Seifert 2009). Single/low copy
423 nuclear genes, while more variable, experience rapid nucleotide saturation and
424 may be more difficult to amplify in degraded material (Bruns & Shefferson 2004).
425 Development of universal primer regions is important for standardization of a
426 molecular identification system, which can be more problematic in nuclear genes.
427 Universality problems can also occur with ITS (Taylor & McCormick 2008), as we
428 saw in our study. Non-orthologous and inconsistent amplification of universal
429 regions may cause missing or inaccurate sequence data, leading to errors in
430 species identification.

431

432 *Multilocus species delimitation and identification*

433 Our data, and to an even greater extent our survey of the literature, clearly
434 demonstrate the limitations of relying on a single locus for identifying and
435 inferring species limits among closely related fungal species. If we had relied on
436 a single locus in this study, such as ITS, we would have underestimated fungal
437 species diversity (Table 3, Appendix 3). This is similar to the findings of Seifert et
438 al. (2007) where beta tubulin, a single-copy nuclear locus, provided diagnostic
439 barcodes for 80% of the *Penicillium* species examined, outperforming both ITS
440 (25%) and COI (66%). Such failure to separate closely related species occurred
441 in every type of gene class, with nuclear genes also being susceptible to
442 incongruence. However, the inclusion of additional loci in a multilocus framework
443 helps to minimize the risk of inaccurate species identification, increasing the
444 proportion of successful species identifications relative to single locus data sets.
445 The number of additional loci needed to achieve a high proportion of successful
446 identifications varied between groups.

447 Demonstration of the improvement in species delimitation and identification
448 that can be obtained with multilocus data sets has prompted recommendations to
449 move towards an integrative multilocus approach (Roe & Sperling 2007b;
450 Rubinoff *et al.* 2006). A recent example of a newly developed multilocus
451 diagnostic system is the 2-locus plant barcode proposed by the CBOL Plant
452 Working Group *et al.* (2009). Rigorous testing of chloroplast gene regions in this
453 study demonstrated that two or three regions are optimal, balancing universality,
454 resolution, and consistency. Using the plant barcode as a benchmark, we

455 strongly support the adoption of a similar multilocus fungal identification system.
456 Other studies with fungi have also demonstrated that multiple loci provide the
457 most accurate species identification and delimitation (Balajee *et al.* 2007;
458 Dettman *et al.* 2006; Petit & Excoffier 2009; Summerbell *et al.* 2005). Despite
459 this, much of the fungal literature relies on a single locus (often ITS) and does not
460 include additional characters to independently evaluate lineage diversity. It is
461 difficult to know when additional characters are needed to clarify species limits
462 since species-level variability is not predictable (Nilsson *et al.* 2008). This
463 unpredictability makes it nearly impossible to reliably include additional
464 characters using only a targeted approach to counter single locus invariability
465 (Rossman 2007; Seifert 2009).

466

467 *Conclusions*

468 Any method that aims to achieve accurate species identification and
469 delimitation should be capable of delimiting closely related species and
470 identifying gene tree versus species tree discordance (Fazekas *et al.* 2008; Funk
471 & Omland 2003; Lahaye *et al.* 2008; Olmstead 1995). Examination of multiple,
472 independent character sets in an integrative taxonomic framework (Roe &
473 Sperling 2007b; Rubinoff *et al.* 2006) can minimize the risk of inaccurate species
474 delimitation by inferring species boundaries through congruence among multiple
475 character sets. With multiple character sets, a genealogical concordance
476 phylogenetic species concept (Taylor *et al.* 2000) could provide a means to
477 detect discordance between gene trees and species trees in an identification

Roe et al. – Fungal Barcoding
January 8, 2010

22

478 framework. Discordance can be particularly problematic for closely related
479 species as their lineages may have not had sufficient time to coalesce, compared
480 to species with longer, independent, evolutionary histories. Ultimately, the
481 development of a molecular identification system like DNA barcoding is a
482 compromise between universality, resolution, efficiency, and consistency
483 (Erickson *et al.* 2008; Vialle *et al.* 2009). Fungal biodiversity vastly exceeds that
484 of many other taxa, so extensive testing will be needed to evaluate potential
485 combinations of loci.

486

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499

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January 8, 2010

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January 8, 2010

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January 8, 2010

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Table 1: Primers used in this study.

Gene	Direction	Sequence (5'-3')	Source
<i>actin</i>			
LepactF	F	TACGTCGGTGACGAGGC	Lim <i>et al.</i> 2004
LepactF_2	F	ACAGTCCAAGCGTGGTATCC	This study
LepactR	R	CAATGATCTTGACCTTCAT	Lim <i>et al.</i> 2004
<i>EF1a</i>			
EF3E	F	GTCGTYATCGGCCACGTCGA	Lim <i>et al.</i> 2004
TEF1-rev	R	GCCATCCTTGGAGATACCAGC	Samuels <i>et al.</i> 2002
<i>Btub</i>			
T1	F	AACATGCGTGAGATTGTAAGT	O'Donnell and Cigelnik 1997
BT12	R	GTTGTCAATGCAGAAGGTCTC G	Kim <i>et al.</i> 2003
BT12_internal	R	CCTCMGTGTAGTGMCCCTTG	This study
<i>ITS2</i>			
ITS3	F	GCATCGATGAAGAACGCAGC	White <i>et al.</i> 1990
TW13	R	GGTCCGTGTTTCAAGACG	White <i>et al.</i> 1990
<i>Anon. Locus</i>			
UFM1_F	F	AGTATGTGCCCCGAATCAG	This study
UFM1_R	R	ATCTGTTGCCGATGCTTG	This study

Table 2: Locus information for single-locus analyses and concatenated multilocus maximum likelihood analysis. Values calculated for the multilocus partitioned ML analysis are shown in brackets for each gene where values differ from single locus analyses. Ingroup character information includes representative sequence data obtained from GenBank.

	actin	EF1a	Btub	UFM	ITS2	Combined
# haplotypes*	15	15	11	10	8	40
# sites	765	630	1045	393	887	3720
# constant char.*	735	615	1007	379	880	3616
# variable char. (uninformative)*	9	2	13	2	3	30
# pars. inform. char.*	21	13	25	12	4	74
% informative*	2.75%	2.06%	2.39%	3.05%	0.34%	1.99%
ML Model	GTR+ Γ	GTR+ Γ	GTR+ Γ	GTR+ Γ	GTR+ Γ	GTR+ Γ
-ln	-1453.2358	-1264.0232	-2020.8777	-638.2299	-1315.2930	-6947.2673
∞ gaps/missing	0.003862	0.1160	0.1580	0.0000	0.03908	0.09674
Base freq.						partitioned
A	0.2079	0.2179	0.2111	0.2203	0.2124	-
C	0.3039	0.3036	0.2790	0.3022	0.2974	-
G	0.2721	0.2267	0.2783	0.2960	0.3187	-
T	0.2162	0.2518	0.2316	0.1814	0.1714	-
Rate Matrix						partitioned
A-C	0.0721 (0.8423)	0.3959 (0.4898)	0.8292 (1.2951)	0.000017	0.4284 (0.2233)	-
A-G	0.8200 (2.5714)	1.2255 (1.8538)	1.9061 (2.8402)	4.1214 (7.1599)	0.1973 (0.1053)	-
A-T	2.6728 (0.000017)	1.5994 (3.1258)	0.5950 (0.8616)	0.000017	0.000017	-
C-G	0.3688 (0.4131)	0.2826 (0.4170)	0.4735 (0.7996)	1.4752 (3.1950)	0.000017	-
C-T	5.3126 (4.2967)	4.2956 (7.2423)	4.3915 (6.2634)	5.6200 (9.4605)	2.4492 (2.1376)	-
G-T	1.0000	1.0000	1.0000	1.0000	1.0000	-
Γ (alpha)	0.02000	0.9497 (0.2318)	0.1820 (0.2457)	0.0200	29.5889 (0.0200)	partitioned

* ingroup only

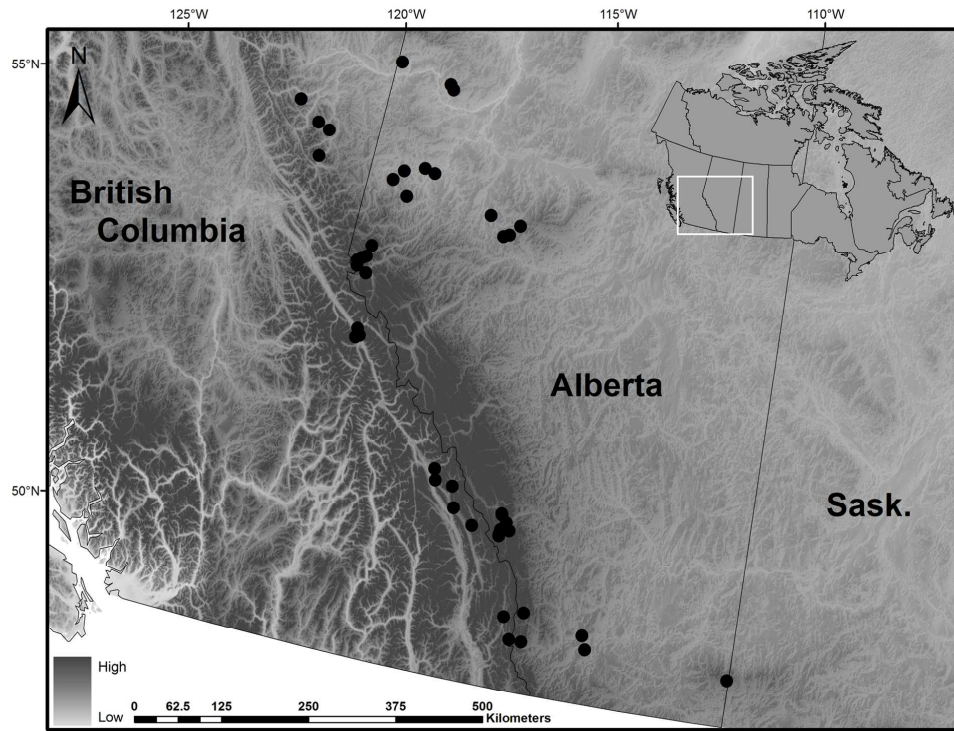


Figure 1: Map of collecting localities surveyed for MPB fungal associates.
168x127mm (600 x 600 DPI)

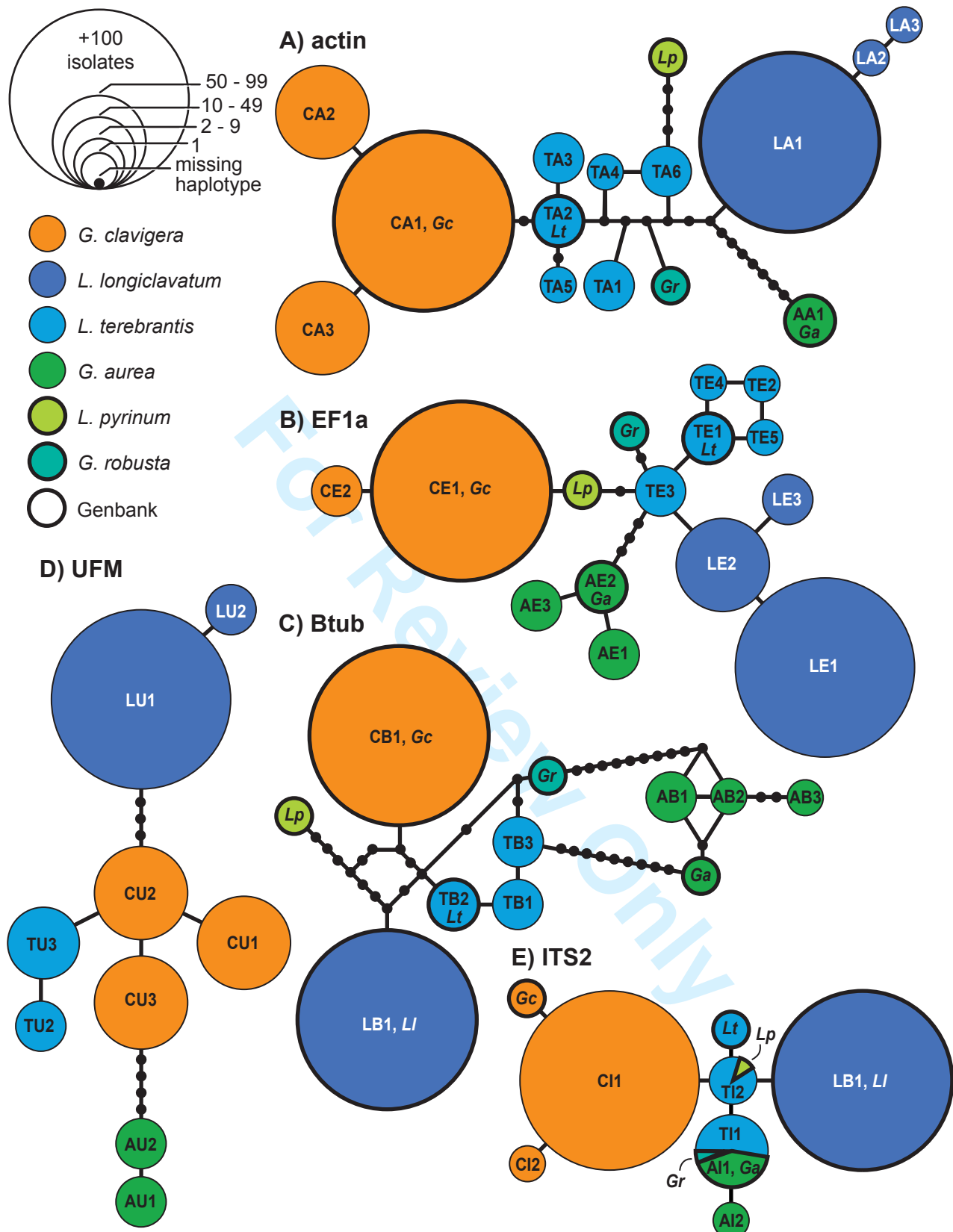


Figure 2: Parsimony haplotype networks for five independent loci of six closely related members of the *Grosmannia* clade. Coloured circles represent individual haplotypes, with circle size proportional to the number of isolates. Lines linking haplotypes represent single nucleotide differences. Black circles indicate missing haplotypes. Haplotypes with thick black borders are identical to representative GenBank sequences. A) actin; B) elongation factor 1 alpha; C) beta tubulin; D) anonymous locus; E) internal transcribed spacer + partial 28S.

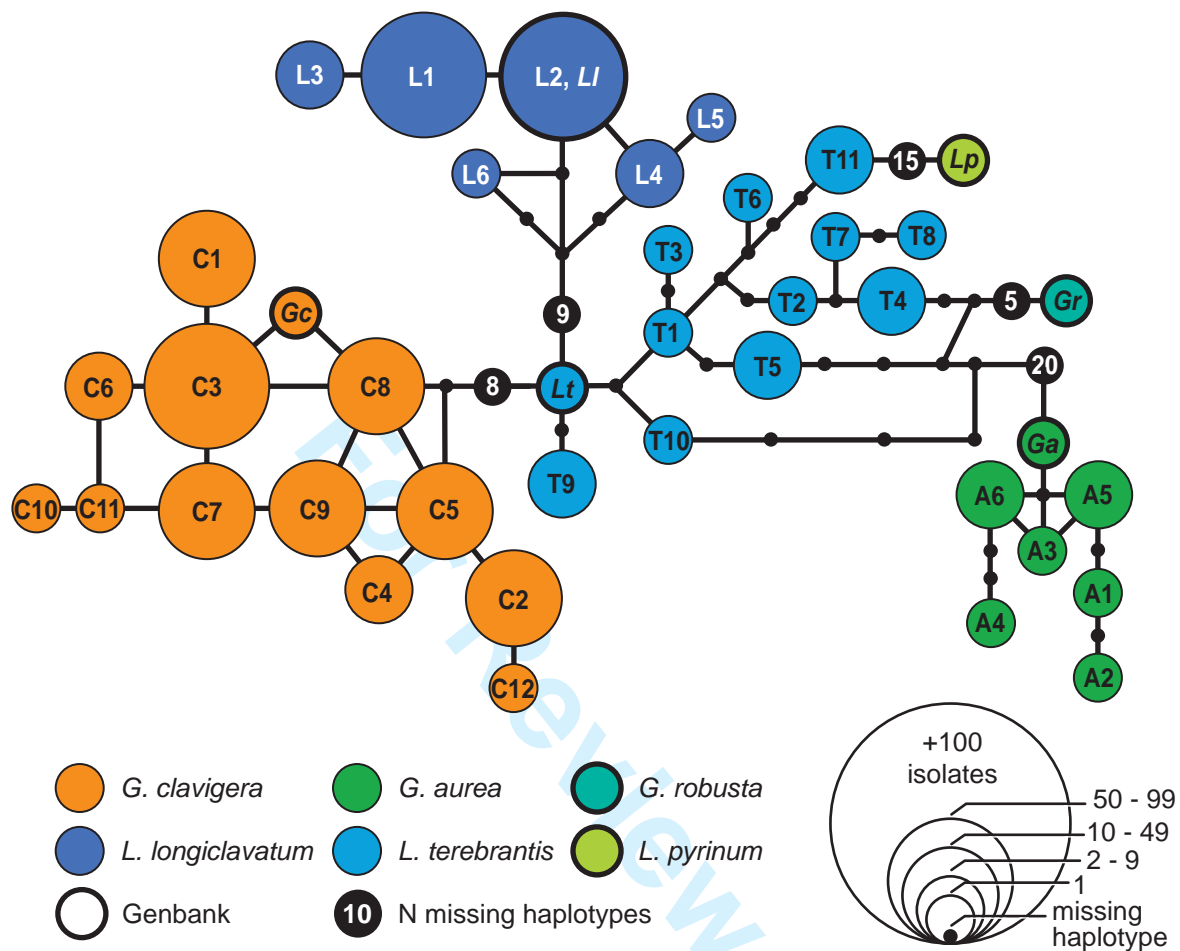


Figure 3: Parsimony haplotype network for the concatenated multilocus data set of six closely related members of the *Grosmannia* clade. See Fig. 2 caption for description of haplotype network.

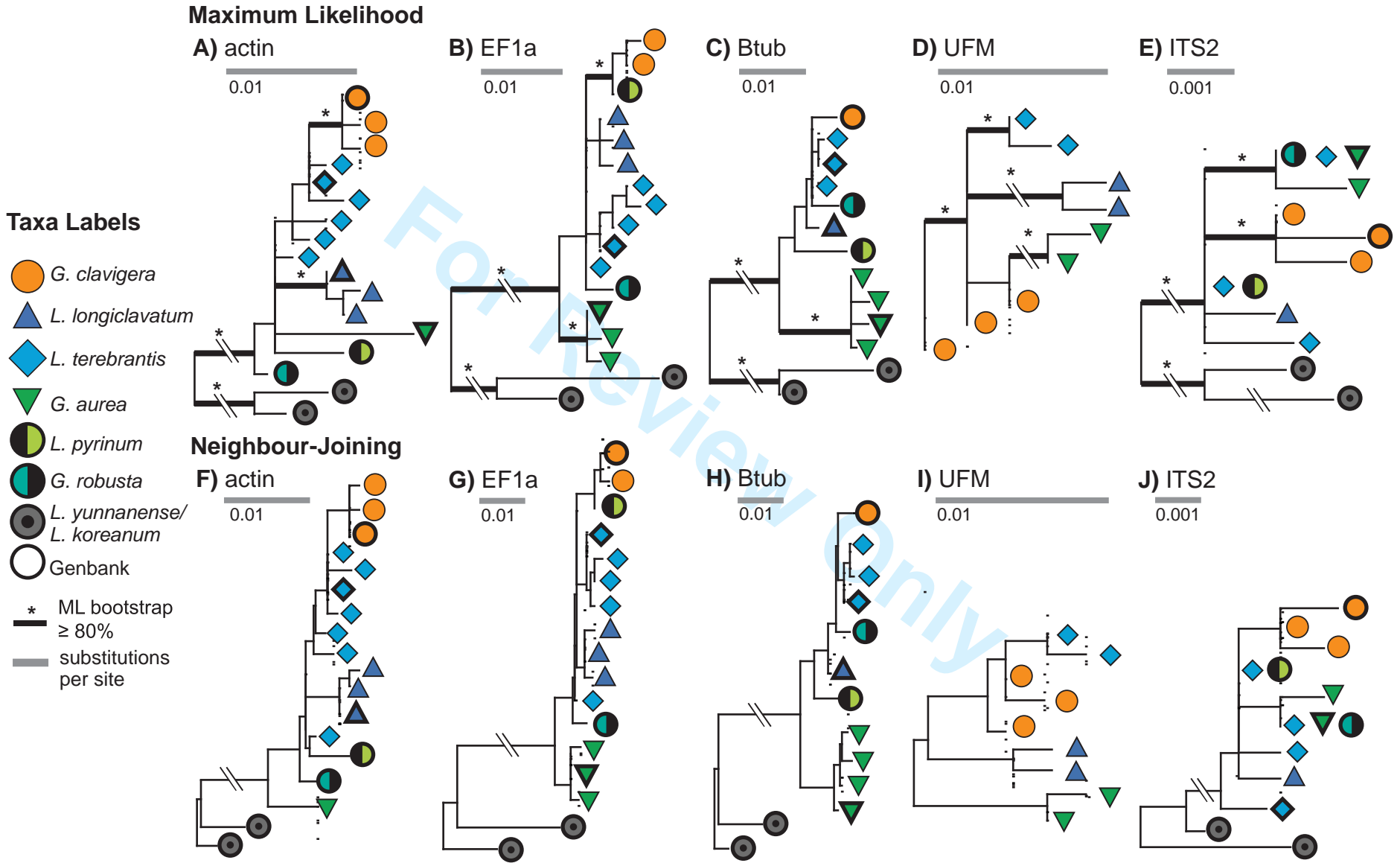


Figure 4: Maximum likelihood (ML) and neighbour-joining (NJ) trees for five independent loci of six closely related members of the *Grosmannia* clade.

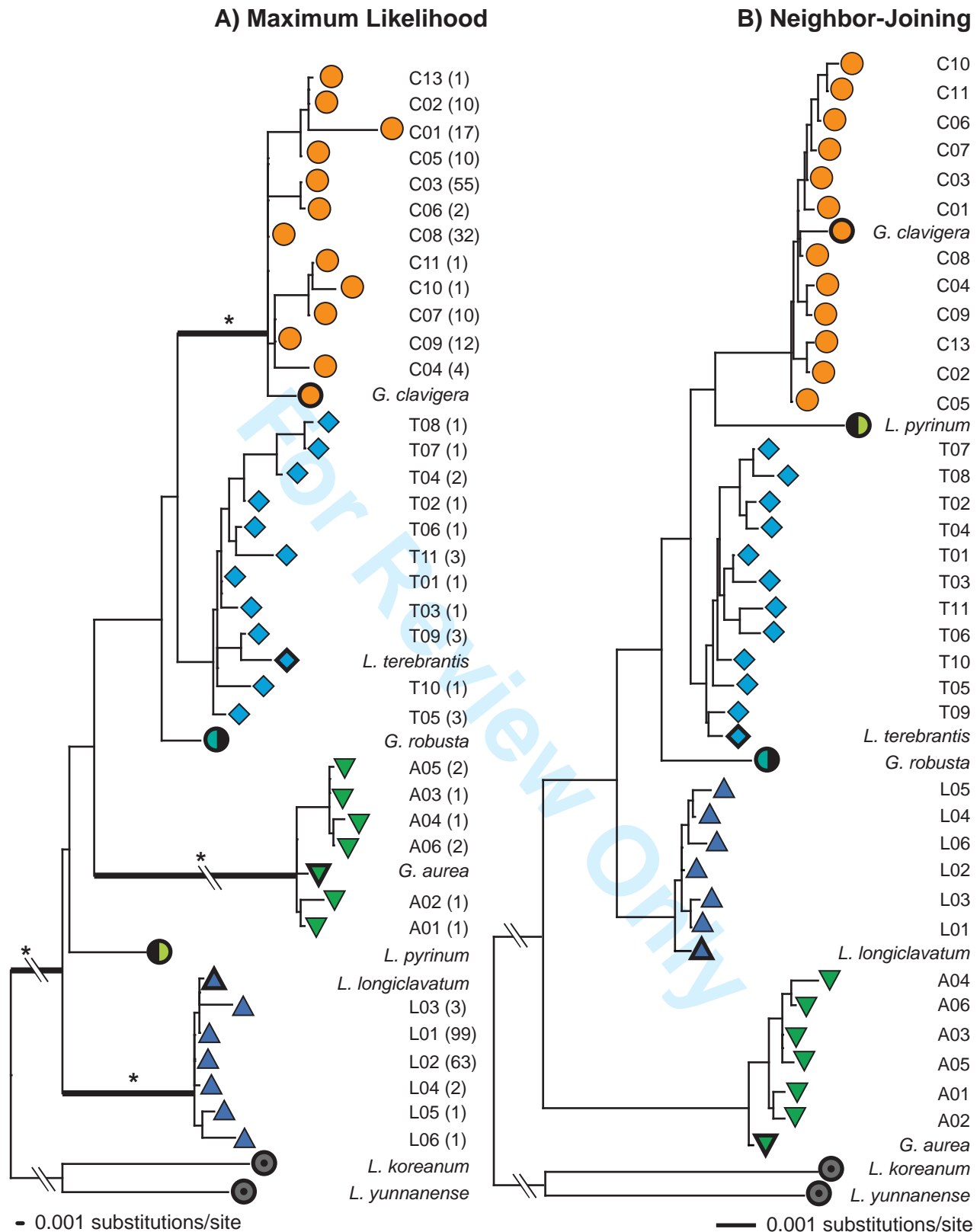


Figure 5: Maximum likelihood and neighbour-joining trees for the concatenated multilocus data set. A) Maximum likelihood phylogram. B) Neighbour-joining tree. Legend as in Fig. 4.

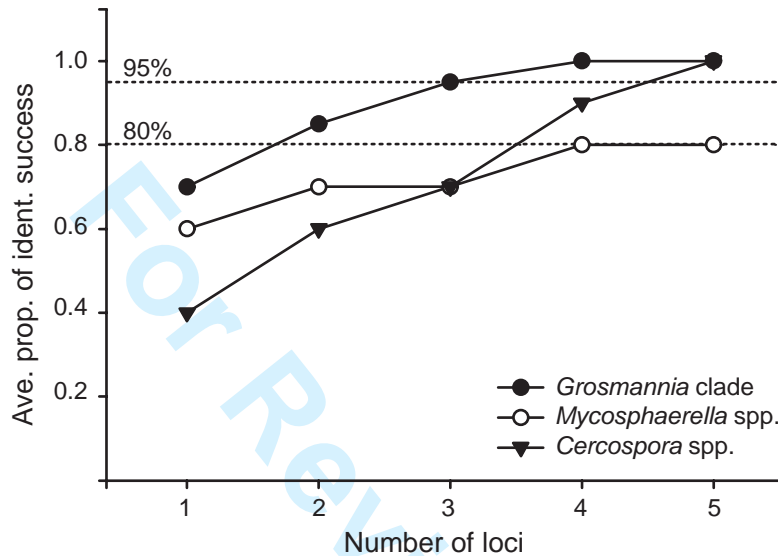


Figure 6: Changes in species identification success with the addition of loci. Proportion of NJ haplotype clusters congruent with published species limits was used as a measure of accurate species identification. All possible locus combinations were examined and averaged for each locus category. Benchmark levels of identification success (80% and 95%) are indicated. Data for this analysis were obtained from the current study (*Grosmannia* clade), Crous et al. (2004) (*Mycosphaerella* spp.), and Groenewald et al. (2005) (*Cercospora* spp.)