Revisiting monophyly in *Haworthia* **Duval (Asphodelaceae): Incongruence, hybridization and contemporary speciation**

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Abstract Molecular phylogenetic reconstructions have indicated that *Haworthia* is not monophyletic. Here we show, using considerably expanded datasets of both chloroplast (*trnL-trnF* and *psbA-trnH* intergenic spacers) and nuclear (ITS1) markers that the issue of a polyphyletic *Haworthia* is more complicated than previously reported. Both parsimony and bayesian analyses of cpDNA and ITS1 produced poorly resolved phylogenies, with little or no support for deeper nodes. Species of *Haworthia* are placed in three of the four main lineages in the cpDNA phylogeny, while in the ITS1 phylogeny *Haworthia* species were placed in two of the four main lineages retrieved. The cpDNA phylogeny was incongruent with that obtained from the ITS1 data, and the topology of the combined dataset reflected that obtained from the ITS1 dataset. As species of *H. subg. Hexangulares* and subg. *Robustipedunculares* have been reportedly involved in intergeneric hybridizations with other Alooideae, it is postulated that a history of ancient hybridization may account for a polyphyletic *Haworthia*. Hybridization is also ongoing between species within *H. subg. Haworthia*, and may be responsible for results indicating that some species in this subgenus are not monophyletic. This hybridization may be facilitated by the lack of effective reproductive barriers. We hypothesize that *Haworthia* is undergoing a contemporary and explosive radiation in southern Africa, driven in part by local adaptation to relatively fine-grained ecological heterogeneity of soils and microclimate.

Keywords contemporary radiation; Haworthia; hybridization; incongruence; ITS1; non-monophyly; psbA-trnH; trnL-trnF

INTRODUCTION

The succulent genus *Haworthia* Duval is endemic to South Africa, Swaziland, Namibia, and Mozambique (Maputaland) (Bayer, 1982, 1999; Scott, 1985). *Haworthia* is centred in the semi-arid parts of the bimodal rainfall region of South Africa where most species grow in subtropical thickets or mosaics of this vegetation type with renosterveld, karooid shrublands and grassy fynbos (Bayer, 1982, 1999). As such, it contributes endemic species to three centres of endemism: the eastern realms of the Succulent Karoo Region (Little Karoo) and Cape Floristic Region, and the Albany Centre (Van Wyk & Smith, 2001).

The genus includes approximately 61 described species and numerous infraspecific taxa (Bayer, 1999). Most species are habitat specialists that occur in small, scattered populations of limited geographical extent (Bayer, 1999, 2002, 2006, 2007, 2008). Haworthia is placed in the subfamily Alooideae (Asphodelaceae; Asparagales) which also includes Aloe L., Astroloba Uitew., Chortolirion A. Berger, Gasteria Duval, Lomatophyllum Willd., and Poellnitzia Uitew. (Chase & al., 2000; Treutlein & al., 2003a). Alooideae have a distinct southern African centre of diversification with outliers in the Arabian Peninsula, Madagascar, and the Mascarene Islands (Treutlein & al., 2003a). Generic concepts in this subfamily vary depending on authority (for details see Chase & al., 2000; Treutlein & al., 2003a) but five genera are widely recognized, viz., Aloe, Astroloba, Chortolirion, Gasteria and Haworthia (Treutlein & al., 2003a).

Haworthia species are invariably small rosette succulent herbs with relatively small, tubular white flowers. Differences in floral morphology have been used to delimit three subgenera, but there is a general paucity of differences in floral characters among species. Haworthia subg. Haworthia has a obclavate tube, upcurved style and triangular or rounded-triangular perianth base; H. subg. Hexangulares Uitewaal ex. M.B. Bayer has a curved tube, with the perianth gradually narrowing to the junction with the pedical (substipitate); and H. subg. Robustipedunculares Uitewaal ex. M.B. Bayer has a straight tube, with the perianth abruptly joined to the pedical (non-stipitate; Bayer, 1999). The leaves (and rosettes) are variable, even within species. The foliar diversity and variation within the genus has contributed to a large horticultural appeal (e.g., *H. attenuata* Haw. and H. cymbiformis (Haw.) Duval are fairly common house and garden plants).

The genus has a difficult and complicated taxonomy, with numerous, closely related taxa being recognized. Details are given in Bayer (1982, 1999), Scott (1985), Breuer (1998, 1999, 2002) and Treutlein & al. (2003b) and are not discussed here. Regular updates are made as more field populations are found and taxonomically assessed (e.g., Bayer, 2002, 2006, 2007, 2008). Bayer (1999) recognizes approximately 61 species and his species concepts are followed here unless otherwise stated. Bayer (1999) favoured photographic material and explanatory notes rather than complex and ambiguous keys. Correct identification relies on pictorial depiction of variation in species (based almost exclusively on leaf characteristics) in combination with habitat and distribution data (Bayer, 1999). These are subjective and open to interpretation to the untrained eye. *Haworthia* has generated considerable interest amongst amateur botanists and succulent collectors. This collector and horticultural appeal has resulted in a plethora of names (at species-level and lower ranks), which has negatively impacted the taxonomic stability of the group. Consequently, species limits and relationships are often contentious, conflicting, and poorly understood.

Haworthia species have few discrete morphological characters suitable for phylogenetic reconstruction, and hence focus has been placed on molecular phylogenies. Chase & al.







Fig. 1. Simplified summary tree topologies from the study of Treutlein & al. (2003b), showing the relationships among genera of Alooideae and *Haworthia* subgenera for the *rbcL*, *matK*, and ITS1 markers.

(2000) were the first to investigate phylogenetic relationships in Asphodelaceae using chloroplast DNA (cpDNA) sequence data. Haworthia (based on two species) was placed in Alooideae, and sister to Gasteria (Chase & al., 2000). Alooideae were recovered as monophyletic, while Asphodeloideae were paraphyletic (Chase & al., 2000). Treutlein & al. (2003a) concentrated on subfamily Alooideae, using cpDNA sequences and genomic fingerprinting (ISSRs). Increased sampling of Alooideae revealed that *Aloe* and *Haworthia* are both non-monophyletic (Treutlein & al., 2003a). Representatives of H. subg. Haworthia formed a monophyletic group with good support, but representatives of H. subg. Hexangulares (and supposedly H. subg. Robustipedunculares) formed a single lineage sister to Gasteria which was nested within a clade also containing Poellnitzia, Astroloba, ×Astroworthia G.D. Rowley, and Aloe aristata Haw. This clade was sister to a lineage comprising *Lomatophyllum*, Chortolirion and predominately Aloe samples. These two clades and H. subg. Haworthia were in turn sister to another clade of arborescent Aloe taxa ("tree Aloes"). Despite this result, the splitting of *Haworthia* into two genera was not advocated by Treutlein & al. (2003a) because the taxonomic rearrangement and rank changes would have complicated the taxonomy of Haworthia and related genera of Alooideae.

Treutlein & al. (2003b) examined *Haworthia* in greater detail using cpDNA markers (as in Treutlein & al., 2003a), a nuclear marker (ITS1) and genomic fingerprinting. Results again indicated that *Haworthia* was polyphyletic and found in two distinct lineages. In the cpDNA phylogenies five main clades were recovered: "Treelike Aloes", "Haworthia II", "True Aloes", "*Aloe plicatilis*", and "Haworthia I". Simplified summary topologies (and placement of *Haworthia* subgenera) for each marker are shown in Fig. 1. Treutlein & al. (2003b) sampled fewer *Haworthia* taxa for the ITS1 phylogeny and recovered two main lineages (Fig. 1) and the ISSR fingerprinting analyses supported the chloroplast analysis. Unfortunately, in all four analyses no samples of *H.* subg. *Robustipedunculares* were included.

The earlier studies used cpDNA *rbcL* and *matK* sequences, both of which are not entirely appropriate (lacking variable and informative characters) at species or subgeneric level (Gielly & Taberlet, 1994; Müller & al., 2006), although *matK* was found to be generally more variable than *rbcL* (Treutlein & al., 2003a). Here we investigate the relationships of the subgenera of *Haworthia* and the issue of possible non-monophyly using additional species (including the previously unsampled subg. *Robustipedunculares*) and faster evolving cpDNA markers (*trnL-trnF* spacer, *psbA-trnH* intergenic spacer). We compare the plastid phylogeny with a phylogeny derived from an expanded ITS1 dataset.

MATERIALS AND METHODS

Sampling. — Samples were taken primarily from living material in private collections, mostly collected by M.B. Bayer (the leading authority of *Haworthia*). These were originally collected in the wild, but subsequently housed at Sheilam

Nursery (Robertson), Shadowlands Nursery (Somerset West), and Selecta Succulenta Nursery (Cape Town). We opted to use material from the above horticultural collections because Haworthia taxa are usually rare and difficult to find in the field. Furthermore, as most species are under some degree of conservation protection (e.g., Witkowski & Liston, 1997; Victor & Dold, 2003), permission to collect wild populations may not have been forthcoming, and recollecting the material from the wild would have taken an inordinate amount of time. Only selected samples were collected from the field. Herbarium vouchers were deposited in KBG or GRA. However, some DNA samples with no herbarium voucher were used and tagged here as sine numero (sn) (Appendix). All Haworthia samples used in this study were identified by M.B. Bayer. A photographic library of these taxa and samples are available upon request from the first author (SR). We attempted to maximize sample representation from the three subgenera of Haworthia. Based on the findings of Treutlein & al. (2003a, b), we also attempted to include all genera of Alooideae with the exception of Chortolirion and Lomatophyllum.

DNA extraction, amplification, and sequencing. — DNA was extracted mostly from fresh leaves, occasionally from frozen leaves, or rarely from leaves dried in silica gel (Chase & Hills, 1991). Whole genomic DNA was extracted following a modified hot CTAB protocol of Doyle & Doyle (1987). Two non-coding cpDNA regions were used, viz., the trnL-trnF and psbA-trnH intergenic spacers (hereafter referred to as trnL-F and *psbA-trnH*, respectively). The *trnL-F* spacer is a widely used cpDNA marker in phylogenetic reconstruction at the species level (Shaw & al., 2005). Several studies on monocotyledons have used this marker at the infrageneric (subgenus, section) and species levels (e.g., Bytebier & al., 2007; Kocyan & al., 2008; Peterson & al., 2008). The psbA-trnH spacer is also a widely used cpDNA marker at the species level in monocotyledons (e.g., Devey & al., 2008; Meng & al., 2008; Dragon & Barrington, 2009). The trnL-F spacer was amplified and sequenced using primers "E" and "F" (Taberlet & al., 1991). The psbA-trnH spacer was initially amplified and sequenced using primers "psbA" and "trnH" (Sang & al., 1997). The "trnH" primer was problematic and an additional primer was designed slightly internal of the original "trnH" primer ("HawtrnH": 5'-TACATCCGCCCCTTATCTAGC-3')

In addition, part of the ITS region (ITS1) was used to provide an independent source of sequence data. The ITS region as a whole is usually more variable than non-coding chloroplast regions, and has been used extensively in phylogenetic studies at the species level in monocotyledons (Kwembeya & al., 2007; Devey & al., 2008; Peterson & al., 2008; Snijman & Meerow, 2010). Adams & al. (2000) used the entire ITS region to study the phylogeny of *Aloe*, while Treutlein & al. (2003b) used the ITS1 spacer to study relationships in Alooideae.

Initial attempts to amplify the entire ITS region (ITS1, 5.8S, ITS2) failed despite numerous attempts using primers "ITS4" and "ITS5" (White & al., 1990) and conditions that have worked for *Aloe* (Adams & al., 2000). Additionally, primer combinations "ITS1"+"ITS4" (White & al., 1990), as well as "ITS18"+"ITS26" (Käss & Wink, 1997; Beyra-Matos & Lavin,

1999), which gave good results for *Kniphofia* (Asphodelaceae) (Ramdhani & al., 2009) did not routinely work. We thus focused on ITS1 as this marker had been used successfully before in Alooideae (Treutlein & al., 2003b). Amplification and sequencing was done with primers "ITS1" and "Chromo5.8R" (Barker & al., 2005).

PCR amplicons were purified using Promega Wizard or Invetec kits following the manufacturers' instructions. Cleaned products were sequenced using the BigDye Terminator sequencing kit v.3.1 (Applied Biosystems, Foster City, California, U.S.A.), in both forward and reverse directions. The cycle-sequencing products were precipitated using a sodium acetate/EDTA protocol. Sequencing was done on a ABI 3100 Genetic Analyzer (Applied Biosystems) at Rhodes University's Sequencing Unit.

Sequence editing and alignment. — Sequence trace files were assembled, checked and edited using Sequencher v.4.2.2. (Gene Codes Corporation, Ann Arbor, Michigan, U.S.A.). All sequences were deposited in GenBank (Appendix). Sequences were aligned manually in MacClade v.4.06 (Maddison & Maddison, 2000). In earlier studies (Chase & al., 2000; Treutlein & al., 2003a) the genus *Bulbine* (subfamily Asphodeliodeae) was used as the outgroup. In this study *Kniphofia* (subfamily Asphodeliodeae) was used as the outgroup because of sequence availability. Gaps were inserted intuitively based on visual inspection of the sequences to minimize the number of nucleotide differences among sequences.

Phylogenetic analyses. — Maximum parsimony (MP) and Bayesian inference (BI) methods were used in phylogenetic reconstruction. Maximum parsimony searches were performed with PAUP* v.4.0b10 (Swofford, 2002) in conjunction with PAUPRat v.1 (Sikes & Lewis, 2001). The parsimony ratchet procedure of Nixon (1999) was implemented. Each ratchet analysis consisted of 20 independent runs of 200 iterations. The trees found in the separate searches were pooled (n = 4000) and served as starting trees for heuristic searches in PAUP* employing TBR branch swapping. All trees were used to construct a strict consensus tree. Parsimony bootstrap analyses for each data partition consisted of 1000 heuristic bootstrap replicates with MAXTREES set at 4000. This proved to be computationally prohibitive and the MAXTREES were reduced to 500.

Bayesian inference was performed using MrBayes v.3.1.1 (Huelsenbeck & Ronquist, 2001). The most appropriate model of sequence evolution for each molecular marker partition was determined using the Akaike information criterion (AIC) as implemented in the program MrModeltest v.2.2. (Nylander, 2004). The analysis using the chosen model was conducted with four Monte Carlo Markov Chains (three heated and one cold). Chains were run for 5,000,000 generations and sampled every 100th generation. The log-likelihood scores were plotted to determine the point of stationarity, and all trees prior to stationarity were discarded as the "burn-in" phase. The subsequent trees were retained, and posterior probabilities (PP) were estimated by constructing a 50% majority-rule consensus tree in PAUP*. Trees were visualized using TreeView (Page, 1996).

Congruence of the cpDNA and nr ITS1 datasets was assessed using the partition homogeneity (ILD) test (Farris & al., 1994). The ILD test was implemented in PAUP* using 1000 replicates, MAXTREES set at 100 and TBR branch swapping.

Phylogenetic networks. — Neighbor-Net (NN), a distance-based network construction method, allows for graphical representation of conflicting phylogenetic signals and interpretation of evolutionary histories which are not tree-like (Bryant & Moulton, 2004). NN splits graphs have been used with varying success to detect reticulate history (Carine & al., 2007; Frajman & Oxelman, 2007; Grimm & Denk, 2008; Weiss-Schneeweiss & al., 2008; Ramdhani & al., 2010; Schulte & al., 2010). Splits graphs were constructed using the NN algorithm with uncorrected p-distances in SplitsTree v.4.10 (Huson, 1998). As the plastid markers are inherited as a single unit they were combined prior to analysis. Both the cpDNA and ITS1 matrices were modified prior to analysis by excluding the outgroup, and subsequent removal of redundant gaps (mostly indels associated with the outgroup).

RESULTS

cpDNA phylogeny. — Details of the cpDNA datasets (individual and combined) are presented in Table 1. Prior to combining datasets, the alignment for individual markers had to be pruned to ensure that sample composition was uniform in the combined cpDNA dataset. An ILD test showed that the two cpDNA data partitions were significantly incongruent (P = 0.003). This incongruence may be caused by the limited signal in the *psbA-trnH* data, as the variability and informativeness were lower than in the *trnL-F* data (Table 1). Thus, despite the result of the ILD test, the cpDNA datasets were merged because the plastid genome is inherited as a single unit. Analysis of the combined cpDNA (hereafter termed cpDNA) dataset with the

parsimony ratchet produced 4000 trees of 300 steps (CI = 0.620, RI = 0.772). In an independent MP analysis without the ratchet, the number of trees was in excess of 20,000. However, the tree length was higher, and the RI and CI values were lower than the ratchet analysis (results not shown). The overall cpDNA topology reflected that of the *trnL-F* marker (topologies of individual datasets are not shown). The topology from the BI analysis is better resolved, and presented here as Fig. 2a. Lineages with posterior probability (PP) values \geq 0.95 and bootstrap (BS) values \geq 70%, are considered well supported.

Four major clades were recovered (labelled A–D in Fig. 2a). Clade A comprised a single Aloe dichotoma sample (a "tree Aloe"). Clade B comprised Poellnitzia rubiflora, Aloe tenuior and H. blackburniae (subg. Haworthia), but this relationship has very weak PP support (0.55) and no BS support. Clade C also lacks support and comprises six clades (Ci-Cvi). Clade Cvi is composed of H. venosa (subg. Hexangularis) and Gasteria brachyphylla var. brachyphylla. This clade has poor PP support (0.60) and no BS support, and is sister to the remaining five clades (Ci-Cv). Clades Ci-Ciii are composed of representatives from H. subg. Hexangularis, and all are well supported in the BI analyses (PP \ge 0.95). However, only clade Ci is well supported in the MP analysis (BS = 98). Clade Civ has good PP support (0.98) and no BS support and is divided into two subclades: one is composed exclusively of H. subg. Robustipedunculares samples, and the other is composed of Astroloba *bullata* samples. Both subclades have very good PP support (1.00), but weak BS support. Clade Cv is composed of Aloe samples (termed here the "Aloe group") and is well supported in the BI and MP analyses (PP = 1.00, BS = 88). Clade D has very good PP support (1.00) and weak BS support. It is composed of a single H. nigra sample (subg. Hexangularis, clade Di) which is sister to samples from H. subg. Haworthia (clade Dii).

Table 1. Summary of sequence characteristics of the trnL-F, psbA-trnH, and ITS1 markers.

	trnL-F	psbA-trnH	Combined cpDNA (<i>trnL-F+psbA-trnH</i>)	ITS1	Combined cpDNA+ITS1
Ingroup/s + Haworthia					
No. of samples	83	74	59	47	47
No. of bp in alignment	565	658	1192	284	1457
No. of variable characters (%)	113 (20.0)	93 (14.1)	173 (14.5)	114 (40.1)	278 (19.1)
No. of PI characters (%)	61 (10.8)	37 (5.6)	83 (7.0)	56 (19.7)	131 (8.3)
CI, RI, tree length	0.648, 0.795, 193	0.692, 0.860, 143	0.620, 0.772, 300	0.765, 0.910, 179	0.687, 0.834, 453
ILD test P value	_	-	<i>P</i> = 0.003	_	P = 0.001
BI Model	GRT+I+G	F81+I+G	<i>trnL-F</i> : GRT+I+G <i>psbA-trnH</i> : F81+I+G	GRT+G	<i>trnL-F</i> : GRT+G <i>psbA-trnH</i> : F81+I+G ITS1: GRT+G
Haworthia			•••••••••••••••••••••••••••••••••••••••	•••••••••••••••••••••••••••••••••••••••	
No. of samples	66	63	48	36	36
No. of bp in alignment	532	640	1164	275	1415
No. of variable characters (%)	67 (12.6)	55 (8.6)	115 (9.9)	71 (25.8)	171 (12.1)
No. of PI characters (%)	41 (7.7)	24 (3.8)	54 (4.6)	41(14.9)	86 (6.1)

CI, consistency index; PI, parsimony-informative; RI, retention index.



ITS1 phylogeny. — Details of the ITS dataset are presented in Table 1. Analysis of ITS1 dataset with MP produced 4000 trees of 179 steps (CI = 0.765, RI = 0.910). In an independent MP analysis without the ratchet, the number of trees was in excess of 20,000. However, the tree length was higher, and the RI and CI values were lower than the ratchet analysis (results not shown). The BI tree is shown in Fig. 2b. Four major clades were recovered (labelled 1-4 in Fig. 2b). Clade 1 is unsupported and composed of Aloe samples (identical to the cpDNA "Aloe group"; Clade Cv in Fig. 2a). Clade 2 is composed of a single Aloe dichotoma sample. Clade 3 is well supported in the BI and MP analyses (PP = 0.96, BS = 84), and is further subdivided into two clades. Clade 3i is composed of Gasteria brachyphylla var. brachyphylla, a clade of H. subg. Hexangularis representatives (corresponding to cpDNA lineages Ci-Ciii), and two samples from H. subg. Robustipedunclares, but receives no support. Clade 3ii is composed of Astroloba bullata samples, and Poellnitzia rubiflora. It is well supported in both the BI and MP analyses (PP = 1.00, BS = 77). Clade 4 has weak support and is subdivided into two clades. Clade 4i is composed of a single Aloe tenuior sample and is sister to clade 4ii which comprises samples from H. subg. Haworthia. This latter clade has very good support (PP = 1.00, BS = 73) and corresponds to cpDNA clade Dii. There is thus only limited congruence between the two topologies, viz.: ITS1 clade 1 and cpDNA clade Cv ("*Aloe* group"), and ITS1 clade 4ii and cpDNA clade Dii (subg. *Haworthia*).

Combined cpDNA and ITS1 phylogeny. — An ILD test showed that the cpDNA and ITS1 data partitions were significantly incongruent (P = 0.001). Despite this result we opted to combine individual alignments to explore the data. A summary of aligned sequence characteristics of the combined cpDNA and ITS1 (hereafter termed combined DNA) dataset is presented in Table 1. The combined DNA tree topology (not shown) had the same general structure as the ITS1 phylogeny (discussed above). The topological structure recovered suggested that the signal provided by the ITS1 marker dominated that of the chloroplast markers. This is a surprising result considering the relatively small size of this marker and the fact that it has fewer variable and parsimony-informative sites (Table 1, although this might in part be attributed to the smaller sample size of this dataset). The retention index for the trees derived from MP analysis of the ITS dataset is very high (Table 1), indicating that the ITS dataset comprises many non-homoplastic synapomorphies, which may be reflected in the observation that the ITS1 phylogeny generally had higher PP and BS values.



Fig.3. Splits graph for chloroplast DNA (cpDNA) sequences of Alooideae. Two major branches were recovered (i.e., lineage D and other lineages [A–C]). The major lineages recovered are more or less congruent with the major cpDNA lineages (see Fig. 2a).

Phylogenetic networks. — The splits graph shows extensive internal network structure, indicating reticulation. The groups formed in the splits graph are (with minor exceptions) readily correlated to the clades recovered in the phylogenies, especially where these received good support. In the discussion below, we use the term "lineage" to refer to groups of specimens in the NN trees (Figs. 3 & 4), and "clade" to refer to groups in the phylogenies (Fig. 2).

The cpDNA splits graph revealed two main lineages (Fig. 3). One of these, lineage D (Fig. 3), correlates to clade D in Fig. 2a and is composed of a single *H. nigra* sample (subg. *Hexangularis*) and samples from *H.* subg. *Haworthia*. The rest of the NN tree is composed of three lineages (labelled A–C in Fig. 3). Lineage A is composed only of *Aloe dichotoma*. Clade B (Fig. 2a) is not recovered in the splits graph. Instead, *Aloe tenuior* and *H. blackburniae* (subg. *Haworthia*) are shown as related, while *Poellnitzia rubiflora* is placed on the opposite side of the splits graph (Fig. 3). This is not unexpected, as there is very weak support for clade B in the cpDNA phylogeny (Fig. 2a). Lineage C in the splits graph is largely congruent with Clade C

of the cpDNA phylogeny. However, the *Aloe* clade (clade Cv in Fig. 2a) is distinct and separate from the remaining samples of NN lineage C. The other subclades of clade C (cpDNA phylogeny) are also retrieved as sublineages in the splits graph (Fig. 3).

The ITS1 splits graph revealed two main groups separated by splits with long branches (Fig. 4). One of the main lineages is Lineage 4ii, while the other main lineage is composed of several clusters (labelled 1–4 in Fig. 4). Lineage 4ii is largely congruent with clade 4 of the ITS1 phylogeny (Fig. 2b), with the exception of *Aloe tenuior* (lineage 4i), which is placed on the other side of the splits graph with lineages 1, 2 and 3. Lineage 1 is composed of the *Aloe* group, and is identical to clade 1 in the ITS1 phylogeny (Fig. 2b). Lineage 2 is composed of a single Aloe dichotoma sample (= clade 2 in Fig. 2b). It is interesting to note that in the splits graph, all Aloe samples cluster together (lineages 1, 2 and 4i). Lineage 3 (including lineages 3i and 3ii) is largely congruent with clade 3 of the ITS phylogeny (Fig. 2b). Lineage 3i comprises H. subg. Hexangularis and subg. Robustipedunclares samples, and a single Gasteria sample. Lineage 3ii comprises Astroloba and Poellnitzia taxa.



Fig. 4. Splits graph for ITS1 sequences of Alooideae. Two major branches were recovered (i.e., lineage 4 and other lineages [1–4]). The major lineages recovered are more or less congruent with the major combined DNA clades (see Fig. 2b).

DISCUSSION

This study demonstrates that, irrespective of whether nrDNA or cpDNA is used, *Haworthia* is not monophyletic and reiterates that *Haworthia* s.l. (and indeed all the currently recognized genera of Alooideae) cannot be studied in isolation, but require a subfamily level contextualization.

The issue of monophyly (or the lack thereof) needs to be assessed critically in all molecular-based phylogenetic studies, especially when considering the weight currently being placed on phylogenies (viz., gene trees) and the consequent implications for evolution, ecology, biogeography and more importantly taxonomic adjustments. Monophyly based on molecular data is becoming an increasingly important facet of generic conceptual delimitation (Humphreys & Linder, 2009), but there has been much debate regarding the treatment of non-monophyletic (viz., paraphyletic) taxa. Brummitt (1996, 1997, 2002, 2003), Rieseberg & Brouillet (1994), Hörandl (2006, 2010), Hörandl & Stuessy (2010) and Nordal & Stedje (2005) have argued that to operate within a taxonomic framework, paraphyletic taxa (irrespective of rank) must be accommodated. Zander (2008) has even suggested that non-monophyly may be evolutionarily informative. Other authors (e.g., De Queiroz, 1988; De Queiroz & Gauthier, 1990, 1992, 1994; Freudenstein, 1998; Scopece & al., 2010) maintain the need for monophyletic taxa. According to Nordal & Stedje (2005) and Van Wyk (2007) the dismissal of paraphyletic groups will cause unnecessary chaos in plant taxonomy for pragmatic reasons. In addition, molecular phylogenetic studies rely on a few markers and many conclusions can be erroneous for various reasons (see Van Welzen, 1998). Although the three currently circumscribed subgenera of Haworthia are distinguishable from each other morphologically using floral characters, the molecular data supports generic non-monophyly (like Treutlein & al., 2003a, b). Thus, we feel it is premature to undertake any taxonomic and nomenclatural rearrangements at generic or subgeneric level.

Additionally, our results also indicate numerous instances of non-monophyletic species (sometimes with good support). In the cpDNA phylogeny *H. glauca*, *H. venosa* (both subg. *Hexangularis*), *H. aristata*, *H. cooperi*, *H. cymbiformis*, *H. pulchella*, *H. mucronata*, and *H. mirabilis* (all subg. *Haworthia*) are resolved as non-monophyletic. In the ITS1 phylogeny a subset of these species were also recovered as non-monophyletic: *H. glauca* (subg. *Hexangularis*); *H. cooperi*, *H. cymbiformis*, and *H. mirabilis* (subg. *Haworthia*; Fig. 2a & b).

Monophyly (or the lack thereof) from a molecular perspective is receiving increasing attention, and several studies have recovered extensive species and/or subgeneric non-monophyly (Kizirian & Donnelly, 2004; Kamiya & al., 2005; Shaw & Small, 2005; Syring & al., 2007; Flagel & al., 2008; Barker & al., 2009; Dragon & Barrington, 2009; Howis & al., 2009; Ramdhani & al., 2009; Carrió & al., 2010; Gurushidze & al., 2010). Syring & al. (2007) and Ramdhani & al. (2009) have suggested that single exemplar phylogenetics can be misleading. We suspect that non-monophyly is common in the southern Africa flora (e.g., Ramdhani & al., 2009, 2010; Howis & al., 2009; Barker & al., 2009) and deserves further research.

Isolating the factors that account for non-monophyly in gene trees irrespective of rank can be challenging. However, it is possible to make causal inferences from topological patterns (Syring & al., 2007). Several factors could account for the lack of monophyly, including unrecognized amplification of a paralogous locus, recombination of divergent alleles, inadequate phylogenetic signal, poor or imperfect alpha taxonomy, introgressive hybridization and incomplete lineage sorting (Draper & al., 2007; Syring & al., 2007; Flagel & al., 2008; Dragon & Barrington, 2009; Ramdhani & al., 2009). These causes can be placed into three non-mutually exclusive categories, viz., human error, erroneously interpretation of data and actual evolutionary processes. Human error due to a poor or imperfect alpha taxonomy could be reflected as non-monophyly. Inadequate phylogenetic signal and amplification of a paralogous locus may result in erroneous interpretation of data. Lastly, actual evolutionary processes such as recombination of divergent alleles, incomplete lineage sorting and introgressive hybridization all result in non-monophyly.

Human error. — *Haworthia* is known for its complex taxonomy, and this could explain non-monophyly at the species level (but not at higher levels). Taxonomic issues in Haworthia range from typification to additional fieldwork needed to understand species variation over geographic distribution ranges. Species concepts differ depending on authority. Species are considered to "intergrade" across geographic barriers and vary across ecological barriers. In very simplistic terms important ecological factors include vegetation, geology and soil type. This intergradation is not continuous but manifests itself in isolated populations creating an irregular pattern difficult to unravel (Bayer, 1982). However, outstanding taxonomic issues at the species level are being resolved with ongoing field and herbarium work (Bayer, 1999, 2002, 2006, 2007, 2008). The only way this can ever be resolved using molecular techniques is to sample many populations and adopt a phylogeographic approach. In this way, perhaps "evolutionarily significant units" (ESUs) sensu Ryder (1986) can be detected, and explained by processes such as those hypothesized below.

Erroneous interpretation of data. — The most common measure of phylogenetic signal is sequence divergence, and lack of sequence divergence could manifest itself as species non-monophyly (e.g., Shaw & Small, 2005; Flagel & al., 2008; Ramdhani & al., 2009; Kellner & al., 2010). Markers used for phylogenetic reconstruction in plants evolve at different rates (Hörandl, 2010). However, if the mode and tempo of sequence divergence has lagged behind morphological evolution, or if the group studied is of recent origin, then no matter which and how many markers are used, non-monophyly may still be evident as a consequence of low sequence divergence. As noted in Table 1, the amount of variation and informativeness of markers used in this study are reasonable, but it could certainly be argued that additional data could improve resolution. Another universal measure of phylogenetic signal is the support value of nodes (bootstrap or posterior probability; Syring & al., 2007). In our datasets we do have weak support values for most of the main lineages and clades. The retention index (RI) is an additional measure of support in the data (synapomorphies). As

noted earlier, the RI value of the ITS1 data is very high (0.910; Table 1), indicating that many of the characters are not homoplasious. Nonetheless, the ITS1 data could still be "positively misleading" (Felsenstein, 1978). Both our result and that of Treutlein (2003a, b) indicate that there is reasonable sequence divergence in *Haworthia*, but generally poor support for many lineages. However, inadequate phylogenetic signal cannot exclusively explain the patterns we recovered.

Paralogy versus orthology. — Paralogy is not a problem usually associated with cpDNA markers because most cp genes are single copy (for an exception see Pirie & al., 2007). This is not usually the case for nuclear markers (Oxelman & Bremer, 2000). In the present study we utilized the ITS1 marker to determine relationships. The ITS region is now widely known to be unsuited for phylogeny reconstruction (Alvarez & Wendel, 2003; Bailey & al., 2003; Small & al., 2004). Despite this, it is widely used, and as long as its limitations are understood it can provide meaningful insights into evolutionary history (Feliner & Rosselló, 2007). Non-monophyly could be the result of ITS paralogy (e.g., Roalson & Friar, 2004; Devey & al., 2008, King & Roalson, 2008). Initial attempts to amplify the entire ITS region (ITS1, 5.8S, ITS2) failed using conditions that have worked for Aloe (Adams & al., 2000). Additionally, primer combinations that worked for the related genus Kniphofia (Ramdhani & al., 2009) did not routinely work for our study system. Consequently, we used only the ITS1 marker, which has been successfully employed in Alooideae (Treutlein & al., 2003b). The failure to amplify the 5.8S and ITS2 regions does raise some concerns and could suggest that paralogues for this marker may exist. A more detailed investigation (PCR amplification and subsequent cloning) will be needed to assess ITS paralogy in Alooideae.

Evolutionary processes: Recombination. — The effect of recombination can have profound consequences on reconstructing genealogies (Posada & Crandall, 2002; Popp & Oxelman, 2007). Recombination results in sequence segments that have different genealogical histories. Consequently, organismal history cannot be accurately depicted by a single phylogenetic tree, but as a set of correlated trees across recombinant segments (Syring & al., 2007). In the present study the effect of recombination cannot be properly assessed because of the limited sampling. However, we cannot rule out the possibility of recombination, which can lead to evolutionary histories that are non-tree-like with reticulate patterns (Bryant & al., 2007), such as those found in the NN analysis (Figs. 3 & 4).

Evolutionary processes: Lineage sorting. — Several studies have shown that incomplete lineage sorting (the persistence and retention of ancestral polymorphisms through speciation events; Syring & al., 2007) may confound phylogenetic reconstruction (Chiang & al., 2004; Roalson & Friar, 2004; Bouillé & Bousquet, 2005; Knowles & Carstens, 2007; Gurushidze & al., 2010; Ramdhani & al., 2010). Paraphyly should be expected as a direct result of incomplete lineage sorting. Over time monophyly may be achieved via the sorting and extinction of lineages. However, mode of speciation and the time needed for sorting of lineages are important factors to consider (Rieseberg & Brouillet, 1994). In *Haworthia*,

incomplete lineage sorting could explain all cases of species non-monophyly within and/or among each of the subgenera. In some studies it is difficult to determine whether hybridization and/or incomplete lineage sorting are driving the pattern of non-monophyly (e.g., Kamiya & al., 2005; Flagel & al., 2008). Non-monophyly of *Haworthia* could be due to both processes, as these are not mutually exclusive (Church & Taylor, 2005; King & Roalson, 2008; Maki & al., 2010). In this scenario, lineage sorting is ongoing while interbreeding (hybridizing) species may exchange genetic material because reproductive barriers are weak or absent.

Evolutionary processes: Hybridization. — It is very difficult to predict the behaviour of hybrids in phylogenetic reconstruction, and hybrids can cause loss of resolution resulting in topological changes in weakly supported regions (McDade, 1992). Hybridization and introgression can result in non-monophyly at various ranks (Roalson & Friar, 2004; Lee & al., 2005; Shaw & Small, 2005; Wang & al., 2005; Mason-Gamer 2008; Yi & al., 2008; Howis & al., 2009; Jabaily & Sytsma, 2010; Ramdhani & al., 2010; Valcárcel & Vargas, 2010). The ability for Haworthia species to hybridize under artificial and field conditions has been well documented (Bayer, 1982, 1999). Bayer (1982) listed nine interspecific hybrids and a single hybrid between Haworthia pumila (subg. Robustipedunculares) and Astroloba muricata. Bayer (1999) added five more intrageneric hybrids to this list. Six hybrids are within Haworthia subg. Haworthia (H. turgida \times H. floribunda, H. blackburniae var. graminifolia × H. arachnoidea, H. herbacea × H. reticulata, H. cymbiformis × H. angustifolia, H. truncata \times H. arachnoidea, H. blackburniae \times H. arachnoidea), six within subg. Hexangulares (H. scabra × H. viscosa, H. viscosa × H. longiana, H. sordida × H. venosa var. woolleyi, H. viscosa \times H. fasciata, H. viscosa \times H. glauca var. herrei, H. monti $cola \times H$. cooperi var. gordoniana) and two are within subg. Robustipedunculares (H. pumila \times H. marginata, H. minima \times H. marginata). None of these natural hybrids are between Haworthia subgenera, suggesting that the floral morphologies or other reproductive barriers are sufficient to ensure isolation.

Several hybrids between *Gasteria* and *Haworthia*, viz., *H. venosa* var. *tessellata* (subg. *Hexangulares*) and other unspecified taxa exist, and *H.* subg. *Hexangulares* and subg. *Robustipedunculares* form intergeneric hybrids (Riley & Majumdar, 1979; Bayer, 1982, 1999; Treutlein & al., 2003a). Thus, (relatively) ancient hybridization between these two *Haworthia* subgenera and other genera of Alooideae is probably the main cause of non-monophyly.

Treutlein & al. (2003a) included the reputed hybrid *H. kewensis* (considered to belong to subg. *Hexangulares*) and ×*Astroloba bicarinata* (considered to be an intergeneric hybrid between a member of subg. *Robustipedunculares* and an *Astroloba*). Treutlein & al. (2003b) included two hybrid taxa (*Haworthia* × *resendiana* and *Haworthia* × *ryderiana*) which have doubtful origins and could not be assigned to a subgenus. As far as we are aware, no hybrid taxa (neither intergeneric nor interspecific) were included in our study.

Bayer (1982) did not consider field hybridization to be a serious problem and acknowledged that hybridization is expected in a relatively young genus until isolation becomes established. Problems associated with species-level variability and identification were not attributed to hybridization (Bayer, 1982). Despite this, it seems plausible that hybridization (old and recent) may have some bearing on the evolutionary history of Alooideae (Treutlein & al., 2003a). Bayer (1999) considers *Haworthia* (subg. *Haworthia*) to be actively speciating, a process driven by factors discussed below. If this is the case, then the species non-monophyly that we observed would not be surprising.

Is Haworthia undergoing contemporary speciation? — The morphological rate and tempo of evolution can outpace the molecular rate and the sensitivity of molecular markers, and non-monophyly may be a consequence of this. This raises concerns about our capacity to resolve the phylogenetic history and relationships using molecular sequences and gene trees (Rokas & al., 2003). Some studies have made the link between non-monophyly and ancient radiations (e.g., Fishbein & al., 2001). Even more studies have documented non-monophyly with strong morphological divergence and attribute this to recent or rapid radiations (Knox & Palmer, 1995; Moore & al., 2002; Klak & al., 2004; Lee & al., 2005; Wang & al., 2005; Popp & Oxelman, 2007; Ramdhani & al., 2009; Kellner & al., 2010). Few studies have considered a contemporary radiation scenario (e.g., Rymer & al., 2010). Contemporary speciation presents difficult challenges in molecular phylogenetics as molecular evolution can lag behind morphological evolution. We hypothesize that the patterns we recovered indicate that Haworthia subg. Haworthia is undergoing rapid and contemporary speciation.

A combination of Early Pliocene geomorphic uplift and rapid climatic aridification produced habitat heterogeneity (Cowling & al., 2009) and triggered the radiation of many southern African lineages, both plant (e.g., Linder, 2005; Howis & al., 2009; Verboom & al., 2009) and animals (e.g., Tolley & al., 2008; Russo & al., 2010). The glacial-interglacial cycles in the Pleistocene would have promoted ongoing speciation, but relative climatic stability, at least in comparison to other midlatitude areas, reduced extinction rates (Jannson & Dynesius, 2002). Consequently, large numbers of young species have accumulated over much of southern Africa (Cowling & Hilton-Taylor, 1994).

As is the case with many other rapidly diverging lineages in southern Africa (e.g., Ellis & Weis, 2006; Ellis & al., 2006; Kellner & al., 2010), speciation in *Haworthia* is associated with fine-scale habitat, especially edaphic differentiation (Bayer, 1999, 2002, 2006, 2007, 2008). However, at this stage it is uncertain as to which biological traits predispose *Haworthia* to such rapid speciation. Incipient specialization, an extremely well documented phenomenon in the southern African flora (Van der Niet & al., 2006; Johnson, 2010). However, this is unlikely to be important in *Haworthia* owing to the similarity in flower structure among taxa (a feature that could facilitate hybridization). Pollination and reproduction biology studies for *Haworthia* are needed to confirm this. We thus hypothesize that contemporary speciation in *Haworthia* (along with ongoing hybridization) can best account for the high degree of non-monophyly, complex taxonomy and high numbers of range-restricted and habitat specialist species.

Further research along the lines of that conducted for *Argyroderma* (Aizoaceae) by Ellis & al. (2006) are required to untangle the effects of habitat on plant form and function within species complexes of *Haworthia*. Preliminary data suggest complex patterns of morphological variation with regard to edaphic factors and habitat (Bayer, 1999, 2002, 2006, 2007, 2008).

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Appendix. Voucher information and GenBank accession numbers included in this study.

Taxa, authorities, collector plus number (herbarium acronym), and GenBank accession numbers (*trnL-F, psbA-trnH*, ITS1). Abbreviations used in voucher information: *C&P, Clark & Pienaar; EA, E. Aslander; GM, G. Marx; JDV, J.D. Venter; MBB, M.B. Bayer; sn* = unnumbered collections with no herbarium voucher; *SR*, = *S. Ramdhani; TD, T. Dold.*

Outgroup: *Kniphofia stricta* Codd, *SR279* (GRA), HQ646848, HQ646907, HQ646954. **Ingroups:** *Aloe africana* Mill., *SR&TDS629/8* (-), HQ646845, HQ646904, HQ646951; *Aloe bowiea* Schult. & J.H Schult., *MBBsn* (-), HQ646842, HQ646901, HQ646948; *Aloe dichotoma* Masson, *SR19/9/08* (-), HQ646847, HQ646906, HQ646953; *Aloe tineata* (Aiton) Haw., *SR&TDS729/8* (-), HQ646846, HQ646905, HQ646952; *Aloe speciosa* Baker, *SR&TDS329/8* (-), HQ646844, HQ646903, HQ646950; *Aloe tenuior* Haw., *SR&TDS229/8* (-), HQ646843, HQ646902, HQ646949. *Astroloba: Astroloba bullata* (Jacq.) Uitew., *MBB6756* (KBG), HQ646838, HQ646897, HQ646844, HQ646900, HQ646898, HQ646992, Gasteria: Gasteria brachyphylla var. brachyphylla (Salm-Dyck) E. van Jaarsveld, *SR848* (GRA), HQ646800, HQ646900, HQ646898, HQ646945. *Gasteria: Basteria brachyphylla* var. brachyphylla (Salm-Dyck) E. van Jaarsveld, *SR848* (GRA), HQ6466900, HQ646900, HQ646947. *Doellnitzia: Poellnitzia: Poellnitzia: Basteria brachyphylla* var. brachyphylla (Salm-Dyck) E. van Jaarsveld, *SR848* (GRA), HQ6466900, HQ646900, HQ646947. *Doellnitzia: Poellnitzia: Basteria: Basteri:*

Appendix. Continued.

HQ646912; Haworthia cooperi var. viridis (Baker) M.B. Bayer, SR&MBBS527/6 (-), HQ646798, HQ646857, -; SR&MBBS319/10 (-), HQ646799, HQ646858, HQ646913; SR&MBBS318/10 (-), HQ646800, HQ646859, HQ646914; SR&MBBS418/10 (-), HQ646801, HQ646860, HQ646915; Haworthia cymbiformis var. incurvula (V. Poelln.) M.B. Bayer, SR&TD719 (GRA), HQ646806, HQ646865, HQ646918; Haworthia cymbiformis var. obtusa (Haw.) Baker, JDV93/45 (-), HQ646807, HQ646866, HQ646919; Haworthia maraisii V. Poelln., MBB6875 (KBG), HQ646808, HQ646867, HQ646920; Haworthia marxii M.B. Bayer, GM623 (-), HQ646809, HQ646868, HQ646921; Haworthia monticola var. asema M.B. Bayer, JDV90/57 (-), HQ646810, HQ646869, HQ646922; Haworthia *mucronata* Haw. *SRS115/09/08* (–), HQ646811, HQ646870, –; *JDV97/128* (–), HQ646812, HQ646871, HQ646923; *Haworthia mutica* Haw., *MBB7032* (KBG), HQ646813, HQ646872, HQ646924; *Haworthia parksiana* V. Poelln., *MBBsn* (–), HQ646814, HQ646873, HQ646925; *Haworthia pulchella* var. *pulchella* M.B. Bayer, MBBsn (-), HO646815, HO646874, HO646926; H. pulchella var. globifera M.B. Bayer, MBB6762 (KBG), HO646816, HO646875, HO646927; Haworthia reticulata Haw., MBBsn (-), HQ646817, HQ646876, HQ646928; Haworthia mirabilis var. triebneriana (V. Poelln.) M.B. Bayer, MBB6983 (KBG), HQ646818, HQ646877, HQ646929; MBB6985 (KBG), HQ646819, HQ646878, HQ646930; Haworthia var. semiviva (V. Poelln.) M. B. Bayer, JDV90/89 (-), HQ646820, HQ646879, HQ6468931. Haworthia subg. Hexangulares: Haworthia attenuata Haw., SR&TDsn6 (-), HQ646821, HQ646880, HQ646932; JDV1942 (-), HQ646822, HQ646881, HQ646933; Haworthia coarctata Haw., SR&TDsn3 (-), HQ646823, HQ646882, HQ646934; Haworthia fasciata (Willd.) Haw., MBB6809 (-), HQ646824, HQ646883, HQ646935; Haworthia glauca Baker, SR&MBBS12/76 (-), HQ646825, HQ646884, HQ646936; MBB9695 (KBG), HQ646826, HQ646885, HQ646937; SR30/06/08 (-), HQ646827, HQ646886, HQ646938; Haworthia nigra (Haw.) Baker, SR&MBBS228/6 (-), HQ646828, HQ646887, -; Haworthia reinwardtii (Salm-Dyck) Haw., MBBsn (-), HQ646829, HQ646888, HQ646939; Haworthia sordida Haw., SR&MBBS327/6 (-), HQ646830, HQ646889; -: Haworthia venosa (Lam.) Haw., MBBsn (-), HQ646832, HQ646891, HQ646940; Haworthia venosa subsp. tessellata (Haw.) M. B. Bayer, C&P120 (GRA), HQ646831, HQ646890, -; Haworthia venosa var. woolleyi (V. Poelln.) M.B. Bayer, MBBsn (-), HQ646833, HQ646892, HQ646941. Haworthia subg. Robustipedunculares: Haworthia kingiana V. Poelln., EA1211 (-), HO646834, HO646893, -; Haworthia marginata (Lam.) Stearn, MBB6952 (KBG), HQ646835, HQ646894, -; Haworthia minima (Ait.) Haw., MBBsn (-), HQ646836, HQ646895, HQ646942; Haworthia pumila (L.) M.B. Bayer, MBB7096 (KBG), HQ646837, HQ646896, HQ646943