

# Orchards



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## List of acronyms

AEC	Adenylate energy charge
Al	Aluminium
ATP	Adenosine triphosphate
B	Boron
Ca	Calcium
Cu	Copper
Fe	Iron
K	Potassium
Mg	Magnesium
Mn	Manganese
Mo	Molybdenum
N	Nitrogen
P	Phosphorus
RSG	Restricted spring growth
S	Sulphur
VS	Visual score
VSA	Visual Soil Assessment
Zn	Zinc

# Visual Soil Assessment

## Introduction

The maintenance of good soil quality is vital for the environmental and economic sustainability of orchards. A decline in soil quality can have a marked impact on tree growth, yield, fruit quality and the operation and running of the orchard. A decline in soil physical properties in particular can take considerable time and cost to correct. Safeguarding soil resources for future generations is an important task for land managers.

Often, not enough attention is given to:

- ❖ the basic role of soil quality in efficient and sustained production;
- ❖ the effect of the condition of the soil on the gross profit margin;
- ❖ the long-term planning needed to sustain good soil quality;
- ❖ the effect of land management decisions on soil quality.

Soil type and the effect of management on the condition of the soil are important determinants of the production performance of orchards and have profound effects on long-term profits. Land managers need tools that are reliable, quick and easy to use in order to help them assess the condition of their soils and their suitability for growing orchard crops, and to make informed decisions that will lead to sustainable land and environmental management. To this end, Visual Soil Assessment (VSA) provides a quick and simple method to assess soil condition and plant performance. The VSA method can also be used to assess the suitability and limitations of a soil for pipfruit, stonefruit and vine crops. Soils with good VSA scores will usually give the best production with the lowest establishment and operational costs.

## The VSA method

Visual Soil Assessment is based on the visual assessment of key soil ‘state’ indicators of soil quality, presented on a scorecard. With the exception of soil texture, the soil indicators are dynamic indicators, i.e. capable of changing under different management regimes and land-use pressures. Being sensitive to change, they are useful early warning indicators of changes in soil condition and as such provide an effective monitoring tool.

### *Visual scoring*

Each indicator is given a visual score (VS) of 0 (poor), 1 (moderate), or 2 (good), based on the soil quality observed when comparing the soil sample with three photographs in the field guide manual. The scoring is flexible, so if the sample you are assessing does not align clearly with any one of the photographs but sits between two, an in-between score can be given, i.e. 0.5 or 1.5. Because some soil indicators are relatively more important for soil quality than others, VSA provides a weighting factor of 1, 2, and 3. The total of the VS rankings gives the overall Soil Quality Index score for the sample you are evaluating. Compare this with the rating scale at the bottom of the scorecard to determine whether your soil is in good, moderate or poor condition.

## The VSA tool kit

PLATE 1 The VSA tool kit

The VSA tool kit (Plate 1) comprises:

- ❖ **A SPADE** – to dig a soil pit and to take a 200-mm cube of soil for the drop shatter soil structure test;
- ❖ **A PLASTIC BASIN** (about 450 mm long x 350 mm wide x 250 mm deep) – to contain the soil during the drop shatter test;
- ❖ **A HARD SQUARE BOARD** (about 260x260 x20 mm) – to fit in the bottom of the plastic basin on to which the soil cube is dropped for the shatter test;
- ❖ **A HEAVY-DUTY PLASTIC BAG** (about 750x 500 mm) – on which to spread the soil, after the drop shatter test has been carried out;
- ❖ **A KNIFE** (preferably 200 mm long) to investigate the soil pit and potential rooting depth;
- ❖ **A WATER BOTTLE** – to assess the field soil textural class;
- ❖ **A TAPE MEASURE** – to measure the potential rooting depth;
- ❖ **A VSA FIELD GUIDE** – to make the photographic comparisons;
- ❖ **A PAD OF SCORECARDS** – to record the VS for each indicator.



## The procedure

### *When it should be carried out*

The test should be carried out when the soils are moist and suitable for cultivation. If you are not sure, apply the ‘worm test’. Roll a worm of soil on the palm of one hand with the fingers of the other until it is 50 mm long and 4 mm thick. If the soil cracks before the worm is made, or if you cannot form a worm (for example, if the soil is sandy), the soil is suitable for testing. If you can make the worm, the soil is too wet to test.

### *Setting up*

#### **Time**

Allow 25 minutes per site. For a representative assessment of soil quality, sample 4 sites over a 5-ha area.

#### **Reference sample**

Take a small sample of soil (about 100x50x150 mm deep) from under a nearby fence or a similar protected area. This provides an undisturbed sample required in order to assign the correct score for the soil colour indicator. The sample also provides a reference point for comparing soil structure and porosity.



## Sites

Select sites that are representative of the field. The condition of the soil in orchards is site specific. Sample sites that have had little or no wheel traffic (e.g. near the tree). The VSA method can also be used to assess compacted areas by selecting to sample along wheel traffic lanes. Always record the position of the sites for future monitoring if required. Note that the VSA can be used to assess the suitability of a soil for growing pipfruit and stonefruit trees and vine crops before the orchard is established.

## *Site information*

Complete the site information section at the top of the scorecard. Then record any special aspects you think relevant in the notes section at the bottom of the plant indicator scorecard.

## *Carrying out the test*

### **Initial observation**

Dig a small hole about 200x200 mm square by 300 mm deep with a spade and observe the topsoil (and upper subsoil if present) in terms of its uniformity, including whether it is soft and friable or hard and firm. A knife is useful to help you assess this.

### **Take the test sample**

If the topsoil appears uniform, dig out a 200-mm cube with the spade.

You can sample whatever depth of soil you wish, but ensure that you sample the equivalent of a 200-mm cube of soil. If for example, the top 100 mm of the soil is compacted and you wish to assess its condition, dig out two samples of 200x200x100 mm with a spade. If the 100–200-mm depth is dominated by a tillage pan and you wish to assess its condition, remove the top 100 mm of soil and dig out two samples of 200x200x100 mm. Note that taking a 200-mm cube sample below the topsoil can also give valuable information about the condition of the subsoil and its implications for plant growth and farm management practices.

### **The drop shatter test**

Drop the test sample a maximum of three times from a height of 1 m onto the wooden square in the plastic basin. The number of times the sample is dropped and the height it is dropped from, is dependent on the texture of the soil and the degree to which the soil breaks up, as described in the section on soil structure.

Systematically work through the scorecard, assigning a VS to each indicator by comparing it with the photographs (or table) and description reported in the field guide.

## **Format of the booklet**

The soil scorecard is given on Figure 1 and lists the ten key soil ‘state’ indicators required in order to assess soil quality. Each indicator is described on the following pages, with a section on how to assess the indicator and an explanation of its importance and what it reveals about the condition of the soil.

**FIGURE 1 Soil scorecard – visual indicators for assessing soil quality in orchards**

Landowner: \_\_\_\_\_ Land use: \_\_\_\_\_  
 Site location: \_\_\_\_\_ GPS ref: \_\_\_\_\_  
 Sample depth: \_\_\_\_\_ Date: \_\_\_\_\_  
 Soil type: \_\_\_\_\_ Soil classification: \_\_\_\_\_  
 Drainage class: \_\_\_\_\_

Textual group (upper 1 m):  Sandy  Loamy  Silty  Clayey  Other  
 Moisture condition:  Dry  Slightly moist  Moist  Very moist  Wet  
 Seasonal weather conditions:  Dry  Wet  Cold  Warm  Average

Visual indicators of soil quality	Visual score (VS) 0 = Poor condition 1 = Moderate condition 2 = Good condition	Weighting	VS ranking
Soil texture <span style="float: right;">pg. 2</span>		x 3	
Soil structure <span style="float: right;">pg. 4</span>		x 2	
Soil porosity <span style="float: right;">pg. 6</span>		x 3	
Soil colour <span style="float: right;">pg. 8</span>		x 1	
Number and colour of soil mottles <span style="float: right;">pg. 10</span>		x 2	
Earthworms (Number = ) <span style="float: right;">pg. 12</span> (Av. size = )		x 3	
Potential rooting depth ( m) <span style="float: right;">pg. 14</span>		x 3	
Surface ponding <span style="float: right;">pg. 18</span>		x 2	
Surface crusting and surface cover <span style="float: right;">pg. 20</span>		x 2	
Soil erosion (wind/water) <span style="float: right;">pg. 22</span>		x 2	
<b>SOIL QUALITY INDEX (sum of VS rankings)</b>			

Soil Quality Assessment	Soil Quality Index
Poor	< 15
Moderate	15–30
Good	> 30



## Assessment

- ❶ Take a small sample of soil (half the size of your thumb) from the topsoil and a sample (or samples) that is (or are) representative of the subsoil.
- ❷ Wet the soil with water, kneading and working it thoroughly on the palm of your hand with your thumb and forefinger to the point of maximum stickiness.
- ❸ Assess the texture of the soil according to the criteria given in Table 1 by attempting to mould the soil into a ball.

With experience, a person can assess the texture directly by estimating the percentages of sand, silt and clay by feel, and the textural class obtained by reference to the textural diagram (Figure 2).

There are occasions when the assignment of a textural score will need to be modified because of the nature of a textural qualifier. For example, if the soil has a reasonably high content of organic matter, i.e. is humic with 15–30 percent organic matter, raise the textural score by one (e.g. from 0 to 1 or from 1 to 2). If the soil has a significant gravelly or stony component, reduce the textural score by 0.5.

There are also occasions when the assignment of a textural score will need to be modified because of the specific preference of a crop for a particular textural class. For example, asparagus prefers a soil with a sandy loam texture and so the textural score is raised by 0.5 from a score of 1 to 1.5 based on the specific textural preference of the plant.

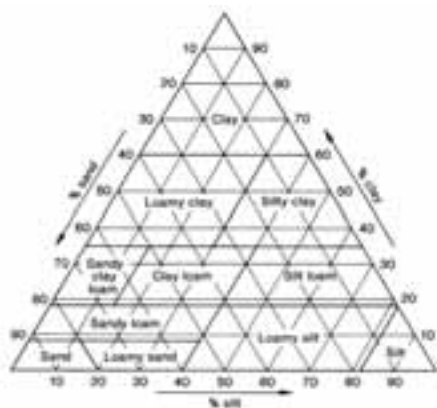


## Importance

**SOIL TEXTURE** defines the size of the mineral particles. Specifically, it refers to the relative proportion of the various size-groups in the soil, i.e. sand, silt and clay. Sand is that fraction that has a particle size  $>0.06$  mm; silt varies between 0.06 and 0.002 mm; and the particle size of clay is  $<0.002$  mm. Texture influences soil behaviour in several ways, notably through its effect on: water retention and availability; soil structure; aeration; drainage; soil trafficability; soil life; and the supply and retention of nutrients.

A knowledge of both the textural class and potential rooting depth enables an approximate assessment of the total water-holding capacity of the soil, one of the major drivers of crop production.

**FIGURE 2 Soil texture classes and groups**



Textural classes.



Textural groups.

**TABLE 1 How to score soil texture**

Visual score (VS)	Textural class	Description
2 [Good]	Silt loam	Smooth soapy feel, slightly sticky, no grittiness. Moulds into a cohesive ball that fissures when pressed flat.
1.5 [Moderately good]	Clay loam	Very smooth, sticky and plastic. Moulds into a cohesive ball that deforms without fissuring.
1 [Moderate]	Sandy loam	Slightly gritty, faint rasping sound. Moulds into a cohesive ball that fissures when pressed flat.
0.5 [Moderately poor]	Loamy sand Silty clay Clay	Loamy sand: Gritty and rasping sound. Will almost mould into a ball but disintegrates when pressed flat. Silty clay, clay: Very smooth, very sticky, very plastic. Moulds into a cohesive ball that deforms without fissuring.
0 [Poor]	Sand	Gritty and rasping sound. Cannot be moulded into a ball.



## Assessment

- ❶ Remove a 200-mm cube of topsoil with a spade (between or along wheel tracks).
- ❷ Drop the soil sample a maximum of three times from a height of 1 m onto the firm base in the plastic basin. If large clods break away after the first or second drop, drop them individually again once or twice. If a clod shatters into small (primary structural) units after the first or second drop, it does not need dropping again. Do not drop any piece of soil more than three times. For soils with a sandy loam texture (Table 1), drop the cube of soil just once only from a height of 0.5 m.
- ❸ Transfer the soil onto the large plastic bag.
- ❹ For soils with a loamy sand or sand texture, drop the cube of soil still sitting on the spade (once) from a height of just 50 mm, and then roll the spade over, spilling the soil onto the plastic bag.
- ❺ Applying only very gently pressure, attempt to part each clod by hand along any exposed cracks or fissures. If the clod does not part easily, do not apply further pressure (because the cracks and fissures are probably not continuous and, therefore, are unable to readily conduct oxygen, air and water).
- ❻ Move the coarsest fractions to one end and the finest to the other end. Arrange the distribution of aggregates on the plastic bag so that the height of the soil is roughly the same over the whole surface area of the bag. This provides a measure of the aggregate-size distribution. Compare the resulting distribution of aggregates with the three photographs in Plate 2 and the criteria given. The method is valid for a wide range of moisture conditions but is best carried out when the soil is moist to slightly moist; avoid dry and wet conditions.



## Importance

**SOIL STRUCTURE** is extremely important for orchards. It regulates:

- ❖ soil aeration and gaseous exchange rates;
- ❖ soil temperature;
- ❖ soil infiltration and erosion;
- ❖ the movement and storage of water;
- ❖ nutrient supply;
- ❖ root penetration and development;
- ❖ soil workability;
- ❖ soil trafficability;
- ❖ the resistance of soils to structural degradation.

Good soil structure reduces the susceptibility to compaction under wheel traffic and increases the window of opportunity for vehicle access and for carrying out no-till, minimum-till or conventional cultivation between rows under optimal soil conditions.

Soil structure is ranked on the size, shape, firmness, porosity and relative abundance of soil aggregates and clods. Soils with good structure have friable, fine, porous, subangular and subrounded (nutty) aggregates. Those with poor structure have large, dense, very firm, angular or subangular blocky clods that fit and pack closely together and have a high tensile strength.

## PLATE 2 How to score soil structure

**GOOD CONDITION VS = 2**

Soil dominated by friable, fine aggregates with no significant clodding. Aggregates are generally subrounded (nutty) and often quite porous.

**MODERATE CONDITION VS = 1**

Soil contains significant proportions (50%) of both coarse clods and friable fine aggregates. The coarse clods are firm, subangular or angular in shape and have few or no pores.

**POOR CONDITION VS = 0**

Soil dominated by coarse clods with very few finer aggregates. The coarse clods are very firm, angular or subangular in shape and have very few or no pores.



## Assessment

- ❶ Remove a spade slice of soil (about 100 mm wide, 150 mm long and 200 mm deep) from the side of the hole and break it in half.
- ❷ Examine the exposed fresh face of the sample for soil porosity by comparing against the three photographs in Plate 3. Look for the spaces, gaps, holes, cracks and fissures between and within soil aggregates and clods.
- ❸ Examine also the porosity of a number of the large clods from the soil structure test. This provides important additional information as to the porosity of the individual clods (the intra-aggregate porosity).



## Importance

It is important to assess **SOIL POROSITY** along with the structure of the soil. Soil porosity, and particularly macroporosity (or large pores), influences the movement of air and water in the soil. Soils with good structure have a high porosity between and within aggregates, but soils with poor structure may not have macropores and coarse micropores within the large clods, restricting their drainage and aeration.

Poor aeration leads to the build up of carbon dioxide, methane and sulphide gases, and reduces the ability of plants to take up water and nutrients, particularly nitrogen (N), phosphorus (P), potassium (K) and sulphur (S). Plants can only utilize S and N in the oxygenated sulphate ( $\text{SO}_4^{2-}$ ), nitrate ( $\text{NO}_3^-$ ) and ammonium ( $\text{NH}_4^+$ ) forms. Therefore, plants require aerated soils for the efficient uptake and utilization of S and N. The number, activity and biodiversity of micro-organisms and earthworms are also greatest in well-aerated soils and they are able to decompose and cycle organic matter and nutrients more efficiently.

The presence of soil pores enables the development and proliferation of the superficial (or feeder) roots throughout the soil. Roots are unable to penetrate and grow through firm, tight, compacted soils, severely restricting the ability of the plant to utilize the available water and nutrients in the soil. A high penetration resistance not only limits plant uptake of water and nutrients, it also reduces fertilizer efficiency considerably and increases the susceptibility of the plant to root diseases.

Soils with good porosity will also tend to produce lower amounts of greenhouse gases. The greater the porosity, the better the drainage, and, therefore, the less likely it is that the soil pores will be water-filled to the critical levels required to accelerate the production of greenhouse gases. Aim to keep the soil porosity score above 1.

## PLATE 3 How to score soil porosity

**GOOD CONDITION VS = 2**

Soils have many macropores and coarse micropores between and within aggregates associated with good soil structure.

**MODERATE CONDITION VS = 1**

Soil macropores and coarse micropores between and within aggregates have declined significantly but are present on close examination in parts of the soil. The soil shows a moderate amount of consolidation.

**POOR CONDITION VS = 0**

No soil macropores and coarse micropores are visually apparent within compact, massive structureless clods. The clod surface is smooth with few or no cracks or holes, and can have sharp angles.





## Assessment

- 1 Compare the colour of a handful of soil from the field site with soil taken from under the nearest fenceline or a similar protected area.
- 2 Using the three photographs given (Plate 4), compare the relative change in soil colour that has occurred.

As topsoil colour can vary markedly between soil types, the photographs illustrate the degree of change in colour rather than the absolute colour of the soil.



## Importance

**SOIL COLOUR** is a very useful indicator of soil quality because it can provide an indirect measure of other more useful properties of the soil that are not assessed so easily and accurately. In general, the darker the colour is, the greater is the amount of organic matter in the soil. A change in colour can give a general indication of a change in organic matter under a particular land use or management. Soil organic matter plays an important role in regulating most biological, chemical and physical processes in soil, which collectively determine soil health. It promotes infiltration and retention of water, helps to develop and stabilize soil structure, cushions the impact of wheel traffic and cultivators, reduces the potential for wind and water erosion, and maintains the soil carbon 'sink'. Organic matter also provides an important food resource for soil organisms and is an important source of, and major reservoir of, plant nutrients. Its decline reduces the fertility and nutrient-supplying potential of the soil; N, P, K and S requirements of trees increase markedly, and other major and minor elements are leached more readily. The result is an increased dependency on fertilizer input to maintain nutrient status.

Soil colour can also be a useful indicator of soil drainage and the degree of soil aeration. In addition to organic matter, soil colour is influenced markedly by the chemical form (or oxidation state) of iron (Fe) and manganese (Mn). Brown, yellow-brown, reddish-brown and red soils without mottles indicate well-aerated, well-drained conditions where Fe and Mn occur in the oxidized form of ferric ( $\text{Fe}^{3+}$ ) and manganic ( $\text{Mn}^{3+}$ ) oxides. Grey-blue colours can indicate that the soil is poorly drained or waterlogged and poorly aerated for long periods, conditions that reduce Fe and Mn to ferrous ( $\text{Fe}^{2+}$ ) and manganous ( $\text{Mn}^{2+}$ ) oxides. Poor aeration and prolonged waterlogging give rise to a further series of chemical and biochemical reduction reactions that produce toxins, such as hydrogen sulphide, methane and ethanol that damage the root system. This reduces the ability of plants to take up water and nutrients, causing poor vigour and ill-thrift. Decay and dieback of roots can also occur as a result of fungal diseases such as *Phytophthora* root and crown rot in soils prone to waterlogging. Trees exhibit reduced growth, have thin canopies, and eventually die.

PLATE 4 How to score soil colour



**GOOD CONDITION VS = 2**

Dark coloured topsoil that is not too dissimilar to that under the fenceline.



**MODERATE CONDITION VS = 1**

The colour of the topsoil is somewhat paler than that under the fenceline, but not markedly so.



**POOR CONDITION VS = 0**

Soil colour has become significantly paler compared with that under the fenceline.

## Assessment

- 1 Take a sample of soil (about 100 mm wide × 150 mm long × 200 mm deep) from the side of the hole and compare with the three photographs (Plate 5) and the percentage chart to determine the percentage of the soil occupied by mottles.

Mottles are spots or blotches of different colour interspersed with the dominant soil colour.

## Importance

The **NUMBER AND COLOUR OF SOIL MOTTLES** provide a good indication of how well the soil is drained and how well it is aerated. They are also an early warning of a decline in soil structure caused by compaction under wheel traffic and overcultivation. The loss of soil structure decreases and blocks the number of channels and pores that conduct water and air and, as a consequence, can result in waterlogging and a deficiency of oxygen for a prolonged period. The development of anaerobic (deoxygenated) conditions reduces Fe and Mn from their brown/orange oxidized ferric ( $\text{Fe}^{3+}$ ) and manganic ( $\text{Mn}^{3+}$ ) form to grey ferrous ( $\text{Fe}^{2+}$ ) and manganous ( $\text{Mn}^{2+}$ ) oxides. Mottles develop as various shades of orange and grey owing to varying degrees of oxidation and reduction of Fe and Mn. As oxygen depletion increases, orange, and ultimately grey, mottles predominate. An abundance of grey mottles indicates the soil is poorly drained and poorly aerated for a significant part of the year. The presence of only common orange and grey mottles (10–25 percent) indicates the soil is imperfectly drained with only periodic waterlogging. Soil with only few to common orange mottles indicates the soil is moderately well drained, and the absence of mottles indicates good drainage.

Poor aeration reduces the uptake of water by plants and can induce wilting. It can also reduce the uptake of plant nutrients, particularly N, P, K and S. Moreover, poor aeration retards the breakdown of organic residues, and can cause chemical and biochemical reduction reactions that produce sulphide gases, methane, ethanol, acetaldehyde and ethylene, which are toxic to plant roots. In addition, decay and dieback of roots can occur as a result of fungal diseases such as *Phytophthora* root and crown rot in soils that are strongly mottled and poorly aerated. Fungal diseases and reduced nutrient and water uptake give rise to poor plant vigour and ill-thrift. Trees exhibit reduced growth, have thin canopies, and can eventually die. If your visual score for mottles is  $\leq 1$ , you need to aerate the soil.

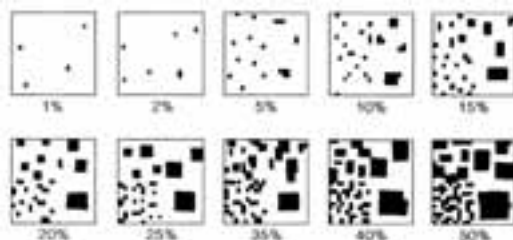


PLATE 5 How to score soil mottles



**GOOD CONDITION VS = 2**  
Mottles are generally absent.



**MODERATE CONDITION VS = 1**  
Soil has common (10–25%) fine and medium orange and grey mottles.



**POOR CONDITION VS = 0**  
Soil has abundant to profuse (> 50%) medium and coarse orange and particularly grey mottles.



## Assessment

- 1 Count the earthworms by hand, sorting through the soil sample used to assess soil structure (Plate 6) and compare with the class limits in Table 2. Earthworms vary in size and number depending on the species and the season. Therefore, for year-to-year comparisons, earthworm counts must be made at the same time of year when soil moisture and temperature levels are good. Earthworm numbers are reported as the number per 200-mm cube of soil. Earthworm numbers are commonly reported on a square-metre basis. A 200-mm cube sample is equivalent to 1/25 m<sup>2</sup>, and so the number of earthworms needs to be multiplied by 25 to convert to numbers per square metre.



## Importance

**EARTHWORMS** provide a good indicator of the biological health and condition of the soil because their population density and species are affected by soil properties and management practices. Through their burrowing, feeding, digestion and casting, earthworms have a major effect on the chemical, physical and biological properties of the soil. They shred and decompose plant residues, converting them to organic matter, and so releasing mineral nutrients. Compared with uningested soil, earthworm casts can contain 5 times as much plant available N, 3–7 times as much P, 11 times as much K, and 3 times as much Mg. They can also contain more Ca and plant-available Mo, and have a higher pH, organic matter and water content. Moreover, earthworms act as biological aerators and physical conditioners of the soil, improving:

- ✦ soil porosity;
- ✦ aeration;
- ✦ soil structure and the stability of soil aggregates;
- ✦ water retention;
- ✦ water infiltration;
- ✦ drainage.

They also reduce surface runoff and erosion. They further promote plant growth by secreting plant-growth hormones and increasing root density and root development by the rapid growth of roots down nutrient-enriched worm channels. While earthworms can deposit about 25–30 tonnes of casts/ha/year on the surface, 70 percent of their casts are deposited below the surface of the soil. Therefore, earthworms play an important role in orchards and can increase growth rates and production significantly.

Earthworms also increase the population, activity and diversity of soil microbes. Actinomycetes increase 6–7 times during the passage of soil through the digestive tract of the worm and, along with other microbes, play an important role in the decomposition of organic matter to humus. Soil microbes such as mycorrhizal fungi play a further role in

the supply of nutrients, digesting soil and fertilizer and unlocking nutrients, such as P, that are fixed by the soil. Microbes also retain significant amounts of nutrients in their biomass, releasing them when they die. Moreover, soil microbes produce plant-growth hormones and compounds that stimulate root growth and promote the structure, aeration, infiltration and water-holding capacity of the soil. Micro-organisms further encourage a lower incidence of pests and diseases. The collective benefits of microbes reduce fertilizer requirements and improve the health of the trees and fruit production.

Earthworm numbers (and biomass) are governed by the amount of food available as organic matter and soil microbes, as determined by the amount and quality of surface residue, the use of cover crops including legumes, and the cultivation of interrows. Earthworm populations can be up to three times higher in undisturbed soils compared with cultivated soils. Earthworm numbers are also governed by: soil moisture, temperature, texture, soil aeration, pH, soil nutrients (including levels of Ca), and the type and amount of fertilizer and N used. The overuse of acidifying salt-based fertilizers, anhydrous ammonia and ammonia-based products, and some insecticides and fungicides can further reduce earthworm numbers.

Soils should have a good diversity of earthworm species with a combination of:

- (i) surface feeders that live at or near the surface to breakdown plant residues and dung;
- (ii) topsoil-dwelling species that burrow, ingest and mix the top 200–300 mm of soil; and
- (iii) deep-burrowing species that pull down and mix plant litter and organic matter at depth.

#### PLATE 6 Sample for assessing earthworms



TABLE 2 Visual scores for earthworms

Visual score (VS)	Earthworm numbers (per 200-mm cube of soil)
2 [Good]	> 30 (with preferably 3 or more species)
1 [Moderate]	15–30 (with preferably 2 or more species)
0 [Poor]	< 15 (with predominantly 1 species)



## Assessment

- 1 Dig a hole to identify the depth to a limiting (restricting) layer where present (Plate 7), and compare with the class limits in Table 3. As the hole is being dug, note the presence of roots and old root channels, worm channels, cracks and fissures down which roots can extend. Note also the firmness and tightness of the soil, whether the soil is grey and strongly gleyed owing to prolonged waterlogging, and whether there is a hardpan present such as a human-induced tillage or plough pan, or a natural pan such as an iron, siliceous or calcitic pan (pp 16–17). An abrupt transition from a fine (heavy) material to a coarse (sandy/gravelly) layer will also limit root development. A rough estimate of the potential rooting depth may be made by noting the above properties in a nearby road cutting, gully, slip, earth slump or an open drain.



## Importance

The **POTENTIAL ROOTING DEPTH** is the depth of soil that plant roots can potentially exploit before reaching a barrier to root growth, and it indicates the ability of the soil to provide a suitable rooting medium for plants. The greater is the rooting depth, the greater is the available-water-holding capacity of the soil. In drought periods, deep roots can access larger water reserves, thereby alleviating water stress and promoting the survival of non-irrigated orchards. The exploration of a large volume of soil by deep roots means that they can also access more macronutrients and micronutrients, thereby accelerating the growth and enhancing the yield and quality of the fruit. Conversely, soils with a restricted rooting depth caused by, for example, a layer with a high penetration resistance such as a compacted layer or a hardpan, restrict vertical root growth and development, causing roots to grow sideways. This limits plant uptake of water and nutrients, reduces fertilizer efficiency, increases leaching, and decreases yield. A high resistance to root penetration can also increase plant stress and the susceptibility of the plant to root diseases. Moreover, hardpans impede the movement of air, oxygen and water through the soil profile, the last increasing the susceptibility to waterlogging and erosion by rilling and sheet wash.

The potential rooting depth can be restricted further by:

- ✦ an abrupt textural change;
- ✦ pH;
- ✦ aluminium (Al) toxicity;
- ✦ nutrient deficiencies;
- ✦ salinity;
- ✦ sodicity;
- ✦ a high or fluctuating water table;
- ✦ low oxygen levels.

Anaerobic (anoxic) conditions caused by deoxygenation and prolonged waterlogging restrict the rooting depth as a result of the accumulation of toxic levels of hydrogen sulphide, ferrous sulphide, carbon dioxide, methane, ethanol, acetaldehyde and ethylene, by-products of chemical and biochemical reduction reactions.

Trees with a deep, dense vigorous root system raise soil organic matter levels and soil life at depth. The physical action of the roots and soil fauna and the glues they produce promote soil structure, porosity, water storage, soil aeration and drainage at depth. Soil depth should preferably not be less than 600 mm. Heavy clay soils are not recommended. Stony soils are acceptable under irrigation systems, particularly if the depth of the soil is less than 1 m. An adequate rooting depth is also needed to provide adequate anchorage of the tree at maturity.

PLATE 7 Generic drawing of the root system of a tree [L. DRAZETA and A. LANG]



TABLE 3 Visual scores for potential rooting depth

VSA score (VS)	Potential rooting depth (m)
2.0 [Good]	> 0.8
1.5 [Moderately good]	0.6–0.8
1.0 [Moderate]	0.4–0.6
0.5 [Moderately poor]	0.2–0.4
0 [Poor]	< 0.2



## Identifying the presence of a hardpan

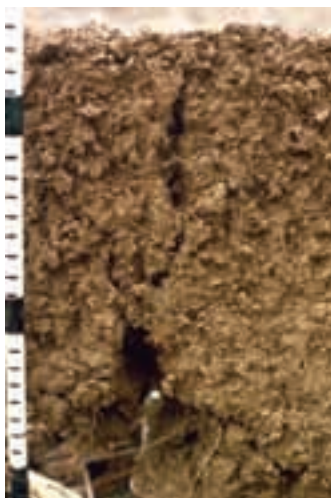
### Assessment

- 1 Examine for the presence of a hardpan by rapidly jabbing the side of the soil profile (that was dug to assess the potential rooting depth) with a knife, starting at the top and progressing systematically and quickly down to the bottom of the hole (Plate 8). Note how easy or difficult it is to jab the knife into the soil as you move rapidly down the profile. A strongly developed hardpan is very tight and extremely firm, and it has a high penetration resistance to the knife. Pay particular attention to the lower topsoil and upper subsoil where tillage pans and plough pans commonly occur if present (Plate 9).
- 2 Having identified the possible presence of a hardpan by a significant increase in penetration resistance to the point of a knife, gauge how strongly developed the hardpan is. Remove a large hand-sized sample and assess its structure, porosity and the number and colour of soil mottles (Plates 2, 3 and 5), and also look for the presence of roots. Compare with the photographs and criteria given Plate 9.

PLATE 8 Using a knife to determine the presence or absence of a hardpan



## PLATE 9 Identifying the presence of a hardpan



### NO HARDPAN

The soil has a low penetration resistance to the knife. Roots, old root channels, worm channels, cracks and fissures may be common. Topsoils are friable with a readily apparent structure and have a soil porosity score of  $\geq 1.5$ .



### MODERATELY DEVELOPED HARDPAN

The soil has a moderate penetration resistance to the knife. It is firm (hard) with a weakly apparent soil structure and has a soil porosity score of 0.5–1. There are few roots and old root channels, few worm channels, and few cracks and fissures. The pan may have few to common orange and grey mottles. Note the moderately developed tillage pan in the lower half of the topsoil (arrowed).



### STRONGLY DEVELOPED HARDPAN

The soil has a high penetration resistance to the knife. It is very tight, extremely firm (very hard) and massive (i.e. with no apparent soil structure) and has a soil porosity score of 0. There are no roots or old root channels, no worm channels or cracks or fissures. The pan may have many orange and grey mottles. Note the strongly developed tillage pan in the lower half of the topsoil (arrowed).



## Assessment

- 1 Assess the degree of surface ponding (Plate 10) based on your observation or general recollection of the time ponded water took to disappear after a wet period during the spring, and compare with the class limits in Table 4.



## Importance

**SURFACE PONDING** and the length of time water remains on the surface can indicate the rate of infiltration into and through the soil, a high water table, and the time the soil remains saturated. Orchard crops generally require free-draining soils. Prolonged waterlogging depletes oxygen in the soil causing anaerobic (anoxic) conditions that induce root stress, and restrict root respiration and the growth and development of roots. Roots need oxygen for respiration and are most vulnerable to surface ponding and saturated soil conditions in the spring when plant roots and shoots are actively growing at a time when respiration and transpiration rates rise markedly and oxygen demands are high. They are also susceptible to ponding in the summer when transpiration rates are highest. Moreover, waterlogging causes the death of fine roots responsible for nutrient and water uptake. Reduced water uptake while the tree is transpiring actively causes leaf desiccation and tip-burn, particularly in the outer canopy. Prolonged waterlogging also increases the likelihood of infections and fungal disease such as *Phytophthora* root rot and foot rot, and reduces the ability of roots to overcome the harmful effects of topsoil-resident pathogens. Trees decline in vigour, have restricted spring growth (RSG) as evidenced by poor shoot and stunted growth, have thin canopies, and can eventually die.

Waterlogging and deoxygenation also results in a series of undesirable chemical and biochemical reduction reactions, the by-products of which are toxic to roots. Plant-available nitrate-nitrogen ( $\text{NO}_3^-$ ) is reduced by denitrification to nitrite ( $\text{NO}_2^-$ ) and nitrous oxide ( $\text{N}_2\text{O}$ ), a potent greenhouse gas, and plant-available sulphate-sulphur ( $\text{SO}_4^{2-}$ ) is reduced to sulphide, including hydrogen sulphide ( $\text{H}_2\text{S}$ ), ferrous sulphide ( $\text{FeS}$ ) and zinc sulphide ( $\text{ZnS}$ ). Iron is reduced to soluble ferrous ( $\text{Fe}^{2+}$ ) ions, and manganese to manganous ( $\text{Mn}^{2+}$ ) ions. Apart from the toxic products produced, the result is a reduction in the amount of plant-available N, S and Zn. Anaerobic respiration of micro-organisms also produces carbon dioxide and methane (also greenhouse gases), hydrogen gas, ethanol, acetaldehyde and ethylene, all of which inhibit root growth when accumulated in the soil. Unlike aerobic respiration, anaerobic respiration releases insufficient energy in the form of adenosine triphosphate (ATP) and adenylate energy charge (AEC) for microbial and root/shoot growth.

The tolerance of trees to waterlogging is dependent on a number of factors, including the time of year, the rootstock and type of tree crop, e.g. pear trees are generally more tolerant than apple trees of saturated soils. Tolerance of waterlogging is also dependent on soil and air temperatures, soil type, the condition of the soil, fluctuating water tables, and the rate of onset and severity of anaerobiosis (or anoxia), a factor governed by the initial soil oxygen content and oxygen consumption rate by plant roots.

Prolonged surface ponding increases the susceptibility of soils to damage under wheel traffic, reducing vehicle access.

#### PLATE 10 Surface ponding in an orchard [A. TOPP]



TABLE 4 Visual scores for surface ponding

VSA score (VS)	Surface ponding due to soil saturation	
	Number of days of ponding *	Description
2 [Good]	≤ 1	No evidence of surface ponding after 1 day following heavy rainfall on soils that were already at or near saturation.
1 [Moderate]	2–4	Moderate surface ponding occurs for 2–4 days after heavy rainfall on soils that were already at or near saturation.
0 [Poor]	> 5	Significant surface ponding occurs for longer than 5 days after heavy rainfall on soils that were already at or near saturation.

\* Assuming little or no air is trapped in the soil at the time of ponding.



## Assessment

- 1 Observe the degree of surface crusting and surface cover and compare with Plate 11 and the criteria given. Surface crusting is best assessed after wet spells followed by a period of drying, and before cultivation.



## Importance

**SURFACE CRUSTING** reduces infiltration of water and water storage in the soil and increases runoff. Surface crusting also reduces aeration, causing anaerobic conditions, and prolongs water retention near the surface, which can hamper access by machinery for months. Crusting is most pronounced in fine-textured, poorly structured soils with a low aggregate stability and a dispersive clay mineralogy.

**SURFACE COVER** helps to prevent crusting by minimizing the dispersion of the soil surface by rain or irrigation. It also helps to reduce crusting by intercepting the large rain droplets before they can strike and compact the soil surface. Vegetative cover and its root system return organic matter to the soil and promote soil life, including earthworm numbers and activity. The physical action of the roots and soil fauna and the glues they produce promote the development of soil structure, soil aeration and drainage and help to break up surface crusting. As a result, infiltration rates and the movement of water through the soil increase, decreasing runoff, soil erosion and the risk of flash flooding. Surface cover also reduces soil erosion by intercepting high impact raindrops, minimizing rain-splash and saltation. It further serves to act as a sponge, retaining rainwater long enough for it to infiltrate into the soil. Moreover, the root system reduces soil erosion by stabilizing the soil surface, holding the soil in place during heavy rainfall events. As a result, water quality downstream is improved with a lower sediment loading, nutrient and coliform content. The adoption of managed cover crops has in some cases reduced sediment erosion rates from 70 tonnes/ha to 1.5 tonnes/ha during single large rainfall events. The surface needs to have at least 70 percent cover in order to give good protection, while  $\leq 30$  percent cover provides poor protection. Surface cover also reduces the risk of wind erosion markedly.

PLATE 11 How to score surface crusting and surface cover



**GOOD CONDITION VS = 2**

Little or no surface crusting is present; or surface cover is  $\geq 70\%$ .

**MODERATE CONDITION VS = 1**

Surface crusting is 2–3 mm thick and is broken by significant cracking; or surface cover is  $>30\%$  and  $<70\%$ .

**POOR CONDITION VS = 0**

Surface crusting is  $>5$  mm thick and is virtually continuous with little cracking; or surface cover is  $\leq 30\%$ .

Surface cover photos: courtesy of A. Leys



## Assessment

- 1 Assess the degree of soil erosion based on current visual evidence and, more importantly, on your knowledge of what the site looked like in the past relative to Plate 12.



## Importance

**SOIL EROSION** reduces the productive potential of an orchard through nutrient losses, loss of organic matter, reduced potential rooting depth, and lower available-water-holding capacity. Soil erosion can also have significant off-site effects, including reduced water quality through increased sediment, nutrient and coliform loading in streams and rivers.

Overcultivation of interrows can cause considerable soil degradation associated with the loss of soil organic matter and soil structure. It can also develop surface crusting, tillage pans, and decrease infiltration and permeability of water through the soil profile (causing increased surface runoff). If the soil surface is left unprotected on sloping ground, large quantities of soil can be removed by slips, flows, gullying and rilling, or it can be relocated semi-intact by slumping. The cost of restoration, often requiring heavy machinery, can be prohibitively expensive.

The water erodibility of soil on sloping ground is governed by a number of factors including:

- ✦ the percentage of vegetative cover on the soil surface;
- ✦ the amount and intensity of rainfall;
- ✦ the soil infiltration rate and permeability;
- ✦ the slope and the nature of the underlying subsoil strata and bedrock.

The loss of organic matter and soil structure as a result of overcultivation between rows can also give rise to significant soil loss by wind erosion of exposed ground where the tree spacing is quite large.

## PLATE 12 How to score soil erosion

**GOOD CONDITION VS = 2**

Little or no evidence of soil erosion. Little difference in height between the mounded row and interrow. The root system is completely covered.

**MODERATE CONDITION VS = 1**

Moderate soil erosion with a significant difference in height between the interrow and the soil around the base of the tree trunk. Part of the upper root system is occasionally exposed.

**POOR CONDITION VS = 0**

Severe soil erosion with deeply incised gullies or other mass movement features between rows. There is a large difference in height between the interrow and the soil around the base of the tree trunk. The root system is often well exposed and sometimes undermined.



## Soil management in orchards

Trees with satisfactory production develop buds of optimal length, promote flower-bud induction, give good percentage fruiting, and stimulate fruit development. Therefore, it is essential to maintain the availability of water, nutrients and carbohydrates during the crop cycle, avoiding any shortages.

Good soil management practices are needed in order to maintain good growth conditions and productivity to safeguard the functionality of the tree, especially during the crucial periods of plant development and fructification. To achieve this, management practices need to maintain and promote the condition and, therefore, functionality of the soil, particularly in regard to its aeration status and the supply of nutrients and water to the plant. To this end, the soil needs to have a good rooting environment, including an adequate soil structure, to allow an effective root system to develop and so maximize the utilization of water and nutrients, and also provide sufficient anchorage for the plant. Good soil structure also promotes infiltration and movement of water through the soil, minimizing surface ponding, runoff and soil erosion.

Where rainfall is not a limiting factor for plant growth, the establishment of cover crops is the most suitable soil management practice to protect the soil surface from erosion, to preserve the environment, to reduce production costs, and to enhance the quality of the fruit. Cover cropping not only helps in reducing water runoff and soil erosion but also improves soil physical characteristics, enriches soil organic matter content and soil life (including earthworm numbers), and suppresses soil-borne diseases by increasing micro-organism biodiversity. However, cover crops compete for minerals, water and fertilizer where they are not well managed. In the absence of irrigation during the hottest months, competition for water could occur during flowering, fruit formation and development, thereby limiting the final yield. To avoid this competition, a temporary cover crop or natural vegetation can be grown from early autumn to mid-spring (often the wettest period), and it can be controlled during the hottest period by herbicide application or mowing 2–3 times during the period of major nutrient demand.

Different mixes of cover crops, including leguminous species that supply N, should be evaluated in different areas. In addition to legumes, the mix could include annual or perennial species, grasses and other broadleaf plants. Winter annuals can be grown to protect the soil from erosion during the winter and to improve the ability of the soil to resist compaction when wet. With their fibrous root system, grasses are also more effective at improving soil structure, and generally add more organic matter to the soil than do legumes. Where allowed to seed in early summer, a seed bank for subsequent regeneration is built up. Where possible, the grass in the interrows and within rows could be kept short by grazing sheep, provided the tree trunks have protective plastic screens to shield them from strip and ring barking. The advantages of managing a grass cover crop using sheep compared with mowing and herbicide strips include: lower use of synthetic (herbicide) chemicals; reduced fossil fuel use; and lower carbon dioxide emissions and, therefore, greater market acceptance. Other advantages include: lower labour and material costs; less compaction along wheel traffic lanes; improved soil nutrient

status; and greater soil life (including earthworm numbers), as a result of the dung and urine applied. Stock tend to rest, urinate and defecate most within the tree row, translocating and concentrating nutrients to where the tree roots are greatest. Sheep can also graze grass very short, reducing not only the competition for water and nutrients but also reducing insect and bird numbers and the possibility of fungal diseases.

The traditional management of the interrow is based on one or two cultivations with discs and tine harrows during the hot period following natural weed cover and it could be satisfactory in limiting, principally, competition for water. The cultivation should be shallower than 100 mm so as to de-vigorate the cover crop but not to modify the canopy/root ratio of the trees by damaging the root system. The cultivation operations can also be useful for incorporating organic and mineral fertilizers as well as controlling diseases caused by fungi and bacteria in the soil.

The application of mulches along the row in the form of compost, bark chips, cereal straw and grass clippings (spread during mowing) shades the soil, so reducing temperature and soil evaporation in summer. Mulches also encourage biological activity, especially earthworms. They suppress weeds and prevent the breakdown of the soil structure under the impact of rain, thereby enhancing water infiltration.

## References

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**Shepherd, T. G., Stagnari, F., Pisante, M. and Benites, J.** 2008. *Visual Soil Assessment – Field guide for orchards*. FAO, Rome, Italy.

The present publication on **Visual Soil Assessment** is a practical guide to carry out a quantitative soil analysis with reproduceable results using only very simple tools. Besides soil parameters, also crop parameters for assessing soil conditions are presented for some selected crops. The **Visual Soil Assessment** manuals consist of a series of separate booklets for specific crop groups, collected in a binder. The publication addresses scientists as well as field technicians and even farmers who want to analyse their soil condition and observe changes over time.

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