

## Maximizing the Potential of Cropping Systems for Nematode Management<sup>1</sup>

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**Abstract:** Quantitative techniques were used to analyze and determine optimal potential profitability of 3-year rotations of cotton, *Gossypium hirsutum* cv. Coker 315, and soybean, *Glycine max* cv. Centennial, with increasing population densities of *Hoplolaimus columbus*. Data collected from naturally infested on-farm research plots were combined with economic information to construct a microcomputer spreadsheet analysis of the cropping system. Nonlinear mathematical functions were fitted to field data to represent damage functions and population dynamic curves. Maximum yield losses due to *H. columbus* were estimated to be 20% on cotton and 42% on soybean. Maximum at-harvest population densities were calculated to be 182/100 cm<sup>3</sup> soil for cotton and 149/100 cm<sup>3</sup> soil for soybean. Projected net incomes ranged from a \$17.74/ha net loss for the soybean-cotton-soybean sequence to a net profit of \$46.80/ha for the cotton-soybean-cotton sequence. The relative profitability of various rotations changed as nematode densities increased, indicating economic thresholds for recommending alternative crop sequences. The utility and power of quantitative optimization was demonstrated for comparisons of rotations under different economic assumptions and with other management alternatives.

**Key words:** cotton, crop rotation, damage function, economic threshold, *Glycine max*, *Gossypium hirsutum*, *Hoplolaimus columbus*, lance nematode, population dynamics, soybean.

Manipulation of cropping systems is one of the oldest and most proven management practices to minimize the impact of plant-parasitic nematodes. Prescribed crop rotations, which limit population increases, have been identified as particularly effective tools against these obligate parasites. By removing the host for an adequate length of time, the population may be reduced below economic thresholds.

In 1911, Bessey (5) recommended the use of crop rotations to control infestations of root-knot nematodes in vegetables. Since then, numerous studies have demonstrated the practical advantages of sequencing crops. A computer literature search resulted in more than 200 citations dealing with "crop rotation." A sampling of these citations showed that most have focused on

end-of-rotation population densities as indicators of successful rotations (1,7,9, 10,12,18,19,22-25,27,29-31,33,37,40, 42-44,46,48,49). Typically, limited numbers of sequences were selected from a set of crops, the rotations were implemented in field trials, and final nematode population densities were measured. Variations on this design have included simultaneous considerations of nematicides (7,23,33), fallow (7,12), soil types (8,9), fertilizer amendments (41,42), tillage (19), organic amendments (31), and resistance (37).

Fewer studies have included consideration of crop yields in evaluating rotations (22,24,28,43,44,48), with most reporting the yield of only the most important crop in the rotation. Little information is available on the overall productivity and economic viability of crop rotation systems. Rodríguez-Kábana et al. (44) reported on the profitability of various soybean-peanut rotations, showing net profits for different combinations of crop rotations and nematicide usage to control *Meloidogyne arenaria* (Neal) Chitwood. Kinloch (29) included predictive models for postharvest densities of *M. incognita* (Kofoid & White) Chitwood in an analysis of crop losses in soybean-maize rotations. Jones and Kemp-ton (26) simulated population dynamics of

Received for publication 21 March 1990.

<sup>1</sup> Colloquium paper presented at the 27th Annual Meeting of the Society of Nematologists, 12-16 June 1988, Raleigh, NC. This work was supported by the United States Agency for International Development, Crop Nematode Research and Development Project, North Carolina State University, under cooperative agreement No. DAN-4149-A-00-4054-00, Project No. 936-4149, and by state and Hatch funds allocated to the Georgia Agricultural Experiment Stations.

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*Globodera rostochiensis* (Woll.) Behrens on potato using models for nematode reproduction, root damage, and nematode survival. Duncan (13) used data from field plots to determine quantitative host-parasite relationships, and simulate the effects of *M. incognita* on a cotton-cowpea cropping system. Ferris and Noling (17) discussed the use of critical-point models in a predictive management recommendation program, using *M. incognita* on cotton-cowpea as an example system.

Thus, the identification of effective crop rotations has been largely a matter of trial and error, through the deployment of research designs which include direct comparisons of specified cropping sequences. These methods, although effective for evaluating planned comparisons, have numerous limitations. Only preplanned crop rotations can be evaluated within a given design, and there is no mechanism to add other comparisons or evaluations of additional management practices to the resulting data. Also, previous crop rotation research has emphasized evaluations based on final output of the system, i.e., total yield or final nematode population densities, which does not add to our understanding of host-parasite dynamics during the individual growing seasons.

With the emergence of improved quantitative approaches to the analysis of nematode host-parasite relationships (3,4,15), more detailed and comprehensive analyses of cropping systems are possible. Using a framework of previously described quantitative methods (34,35), we have demonstrated the potential of cropping systems analyses. The crop-nematode system used for this demonstration consists of *Hoplostaimus columbus* Sher on cotton and soybean, using data collected from on-farm plots in North Carolina.

#### MATERIALS AND METHODS

Population densities of *H. columbus* were assessed at planting and at harvest, and yield data were collected from naturally infested on-farm plots over two growing seasons. Mathematical models representing dam-

age functions and population changes were fitted to data from the field plots. The models then were used to simulate rotation systems of cotton and soybean in a microcomputer spreadsheet environment. Economic data on crop production costs and market prices were added to the spreadsheet simulation to predict economic performance of selected rotations. The economic performance of these rotations then were plotted against at-plant densities of *H. columbus* to demonstrate the potential utility of this quantitative approach for developing and evaluating nematode management alternatives.

*Field data collection:* Two grids of 64 plots each were established on a farm in Scotland County North Carolina (Marlboro loamy sand—clayey, kaolinitic, thermic, typic Paleudults). Each plot consisted of four rows, 20 m long and 1 m apart. Grids eight plots wide by eight plots long were arranged over previously assayed clusters of *H. columbus* so that wide ranges of population densities were obtained by utilizing naturally occurring spatial aggregation (36). Plots were arranged along crop rows immediately after planting, and soil samples were collected for nematode assays.

Soil samples for nematode assay were obtained by bulking and mixing 12 individual 2.5-cm-d soil cores collected to a depth of 20 cm in a zig-zag pattern from the rhizosphere of the two center rows of each plot. Plant-parasitic nematodes were extracted from 500-cm<sup>3</sup> subsamples by elutriation and sucrose centrifugation (approximate efficiency = 0.20) (2,11). Nematodes were identified, counted, and reported per 100 cm<sup>3</sup> soil.

Both sites were planted to cotton, *Gossypium hirsutum* L. cv. Coker 315, and at-plant nematode assays were collected 23 May 1985. Plants were defoliated 6 September. Cotton was harvested and final nematode assays were collected 19 September from the two center rows of each plot when the plants were fully senescent. Seed cotton yields were converted to lint weights with a conversion factor of 0.33.

During the second growing season, soy-

bean, *Glycine max* (L.) Merrill cv. Centennial, was planted on both sites and at-plant nematode assays were collected 11 June 1986. Steel marking pins had been established at the end of the previous growing season to allow precise relocation of the grids. Beans were harvested and final nematode assays were collected 7 October from the two center rows of each plot when plants were fully senescent.

The fields containing research plots were managed by a commercial grower using recommended practices for each crop, except that no nematicidal compounds were applied. No disturbance of the normal agricultural ecosystem was imposed by the data collection procedures, so resulting information accurately represented grower conditions.

*Mathematical analyses:* Our goal in analysis was to obtain mathematical functions that offered the best possible representations of nematode damage functions, relating crop yields to at-plant densities of *H. columbus*, and nematode population changes, relating harvest densities of *H. columbus* to at-plant counts. For this purpose, two nonlinear functions were selected and fitted to the data collected from field plots.

In order to simplify the analysis and presentation of results, crop damage and nematode population increase functions were fitted to frequency class means constructed from nematode counts and yield data from both sites (16). In this procedure a frequency analysis was done on at-plant *H. columbus* densities, and then data were arranged into 16 equal-size categories of eight data points each. Because of the ranking inherent in the frequency analysis, the categories represented increasing nematode densities. After the observations in the dataset were grouped in this manner, means of at-plant and harvest *H. columbus* densities and crop yields were calculated for each group (Table 1) and used for further analyses.

The inverse-logistic function (P. B. Bur-

rows, unpubl.) used to represent nematode damage was

$$Y = m + \frac{(M - m)}{1 + \left(\frac{Pi}{u}\right)^b} \quad (1)$$

where Y represents crop yield, Pi is at-plant nematode density, M is maximum yield, m is minimum yield, and u and b together determine shape and location of the resulting curve.

Nematode population changes during the growing season were represented by the increasing exponential function

$$Pf = M(1 - e^{-bPi}) \quad (2)$$

where Pf is the harvest population density, Pi is the at-plant density, M is the maximum population density, and b determines the exponential rate of increase. Both functions (eq. 1, eq. 2) are dependent on Pi, which was selected as a population estimate having potential for application in a nematode management advisory system. The formula relating Pf to Pi was necessary to estimate residual populations at the end of a growing season. The indicated nematode damage and population change functions were fitted to field data using nonlinear least-squares estimation (45).

In an attempt to describe overwinter survival, both linear and decreasing exponential functions were fitted to the relationship between harvest *H. columbus* counts from the first season (Pf1) and at-plant counts from the second season (Pi2). However, no significant density dependence was detected in the Pf1 to Pi2 relationship. The average survival rate of *H. columbus* was 70%, and this constant survival rate was assumed in subsequent analyses.

*Cropping system analysis:* A discrete stepwise analysis of various rotations of cotton and soybean was constructed in a microcomputer spreadsheet program (Microsoft Excel, Microsoft Corp., Redmond, WA). First, a range of input Pi was generated as representative of the field data (0–350 *H. columbus* per 100 cm<sup>3</sup> soil). This column in the spreadsheet then was used as a data

TABLE 1. Frequency class means,† ranges, and coefficients of variation (CV) for at-plant and harvest counts of *Hoplotaimus columbus* and yield of cotton and soybean used in nonlinear regression analysis.

| Freq. class | <i>H. columbus</i> /100-cm <sup>2</sup> soil |         |    |         |         |     | Yield |             |    |
|-------------|--|---------|----|---------|---------|-----|-------|-------------|----|
|             | At-plant                                     |         |    | Harvest |         |     | Mean  | Range       | CV |
|             | Mean   | Range   | CV | Mean    | Range   | CV  |       |             |    |
| Cotton      |  |         |    |         |         |     |       |             |    |
| 1           | 7  | 2-12    | 51 | 112     | 52-230  | 52  | 877   | 741-1,107   | 15 |
| 2           | 16   | 14-18   | 10 | 127     | 34-288  | 77  | 818   | 647-920     | 11 |
| 3           | 22   | 20-24   | 8  | 124     | 34-230  | 50  | 907   | 733-1,115   | 13 |
| 4           | 26   | 24-26   | 4  | 144     | 36-432  | 92  | 843   | 671-1,061   | 14 |
| 5           | 31   | 28-34   | 8  | 148     | 90-208  | 27  | 852   | 413-1,084   | 23 |
| 6           | 37   | 34-38   | 4  | 160     | 100-248 | 38  | 875   | 780-975     | 8  |
| 7           | 40   | 38-42   | 3  | 132     | 26-222  | 51  | 829   | 569-1,022   | 21 |
| 8           | 46   | 42-48   | 5  | 192     | 108-310 | 36  | 802   | 592-1,045   | 17 |
| 9           | 51   | 48-54   | 4  | 152     | 30-264  | 52  | 786   | 460-1,076   | 30 |
| 10          | 58   | 56-62   | 4  | 182     | 52-386  | 78  | 855   | 468-1,123   | 25 |
| 11          | 67   | 64-70   | 3  | 177     | 100-364 | 52  | 795   | 741-897     | 6  |
| 12          | 74   | 70-78   | 4  | 163     | 76-304  | 46  | 752   | 694-819     | 6  |
| 13          | 83   | 80-88   | 3  | 182     | 84-326  | 45  | 746   | 546-905     | 15 |
| 14          | 97   | 90-100  | 3  | 216     | 104-400 | 41  | 683   | 382-913     | 26 |
| 15          | 115  | 100-128 | 8  | 218     | 60-354  | 45  | 735   | 507-920     | 17 |
| 16          | 161  | 132-250 | 24 | 166     | 56-348  | 58  | 699   | 499-889     | 18 |
| Overall     | 58   | 2-250   | 70 | 162     | 26-432  | 54  | 803   | 382-1,123   | 19 |
| Soybean     |  |         |    |         |         |     |       |             |    |
| 1           | 19   | 4-28    | 41 | 42      | 2-159   | 135 | 2,382 | 1,400-4,025 | 40 |
| 2           | 30   | 28-32   | 6  | 20      | 4-36    | 53  | 2,292 | 1,540-3,780 | 33 |
| 3           | 36   | 32-38   | 6  | 58      | 4-328   | 192 | 1,804 | 857-3,150   | 39 |
| 4           | 45   | 40-52   | 10 | 28      | 6-74    | 97  | 2,052 | 875-3,027   | 37 |
| 5           | 58   | 52-66   | 8  | 49      | 12-96   | 69  | 1,678 | 630-3,325   | 49 |
| 6           | 73   | 68-80   | 6  | 68      | 22-156  | 64  | 2,387 | 647-4,515   | 55 |
| 7           | 83   | 82-84   | 1  | 58      | 6-196   | 121 | 1,914 | 752-3,220   | 48 |
| 8           | 90   | 84-96   | 5  | 28      | 0-98    | 113 | 1,477 | 315-2,783   | 68 |
| 9           | 101  | 96-112  | 7  | 93      | 10-344  | 123 | 2,021 | 665-3,115   | 47 |
| 10          | 121  | 112-124 | 5  | 37      | 6-68    | 56  | 2,023 | 420-3,920   | 67 |
| 11          | 134  | 124-144 | 6  | 54      | 18-100  | 63  | 1,348 | 280-2,205   | 45 |
| 12          | 161  | 148-168 | 4  | 161     | 16-488  | 110 | 1,680 | 332-3,010   | 57 |
| 13          | 170  | 168-172 | 1  | 129     | 20-304  | 89  | 1,840 | 630-2,765   | 45 |
| 14          | 183  | 172-192 | 4  | 118     | 10-416  | 113 | 1,555 | 175-2,362   | 45 |
| 15          | 240  | 196-284 | 13 | 113     | 8-248   | 92  | 1,687 | 315-2,975   | 54 |
| 16          | 322  | 288-376 | 10 | 117     | 26-456  | 123 | 1,177 | 560-2,800   | 74 |
| Overall     | 117  | 4-376   | 70 | 73      | 0-488   | 131 | 1,832 | 175-4,515   | 51 |

† Mean of eight observations per frequency class; 8 × 16 classes = 128 total observations per crop.

series of  $P_i$  for the next column, which contained the formula for a damage function (eq. 1) as generated from the field data for either cotton or soybean. The damage functions calculated estimated yields per hectare for each  $P_i$ . These estimated yields served as input for the next column in the spreadsheet, which calculated net profits based on market prices (5-year average) (39) and fixed and variable costs of production for cotton (20) and soybean (14). Prices used were \$1.27/kg lint cotton, \$0.09/kg cotton seed, and \$0.21/kg seed soybean.

Cotton production costs were estimated as \$791.00/ha fixed and \$0.24/kg variable. Soybean production costs were estimated as \$368.00/ha fixed and \$0.003/kg variable.

The next column in the spreadsheet calculated crop-dependent  $P_f$  (harvest *H. columbus* densities) from  $P_i$  in the first column, again using the nonlinear formula (eq. 2) based on field data. These counts were "overwintered" in the next spreadsheet column, using a survival rate of 0.70 based on the change in *H. columbus* densi-

TABLE 2. Parameter estimates and nonlinear regression statistics for damage functions and *Hoplolaimus columbus* population increases for cotton and soybean.

| Parameter estimate   | Asymptotic standard error | Least squares analysis |            |                |             |            |
|----------------------|---------------------------|------------------------|------------|----------------|-------------|------------|
|                      |                           | Source                 | df         | Sum of squares | Mean square |            |
| Cotton               |                           |                        |            |                |             |            |
| Damage function†     |                           |                        |            |                |             |            |
| m                    | 693.0                     | 37.0                   | Regression | 4              | 10,379,230  | 2,594,807  |
| M                    | 861.0                     | 16.9                   | Residual   | 12             | 13,024      | 1,085      |
| u                    | 68.0                      | 11.1                   | Total      | 16             | 10,392,253  |            |
| b                    | 4.1                       | 2.3                    |            |                |             |            |
| Population increase‡ |                           |                        |            |                |             |            |
| M                    | 182.00                    | 8.90                   | Regression | 2              | 427,449     | 213,750    |
| b                    | 0.06                      | 0.01                   | Residual   | 14             | 7,691       | 549        |
|                      |                           |                        | Total      | 16             | 435,190     |            |
| Soybean              |                           |                        |            |                |             |            |
| Damage function      |                           |                        |            |                |             |            |
| m                    | 1,210                     | 550.5                  | Regression | 4              | 54,502,656  | 13,625,664 |
| M                    | 2,100                     | 168.7                  | Residual   | 12             | 1,100,295   | 91,691     |
| u                    | 150                       | 73.0                   | Total      | 16             | 55,602,951  |            |
| b                    | 3                         | 3.1                    |            |                |             |            |
| Population increase  |                           |                        |            |                |             |            |
| M                    | 149.000                   | 45.500                 | Regression | 2              | 101,311     | 50,656     |
| b                    | 0.007                     | 0.004                  | Residual   | 14             | 11,853      | 847        |
|                      |                           |                        | Total      | 16             | 113,164     |            |

† m = minimum yield (kg/ha); M = maximum yield (kg/ha); u and b are parameters that determine curve shape.

‡ M—maximum population density (number of nematodes/100 cm<sup>2</sup> soil); b determines exponential rate of increase.

ties from harvest of the first season until planting for the second season. This column of overwintered *H. columbus* densities was used as input in the next crop cycle, and the entire procedure was repeated as necessary to complete the 3-year crop rotation evaluation. Crop damage and nematode increase functions were used as appropriate for the selected rotation.

At the end of a 3-year sequence, the overwinter column of nematode counts was calculated to represent the residual nematode population densities at the end of a rotation. A final column was calculated as the sum of the net profits for each year divided by 3, to represent the average net profit per hectare per year for each beginning Pi for each 3-year rotation. All constants, including parameter estimates for the crop damage and nematode increase functions, and economic variables were kept in a separate area of the spreadsheet and linked to their respective functions. Thus, the function parameters and economic constraints could be changed easily,

and the entire spreadsheet could be recalculated. All possible 3-year rotations of cotton and soybean were programmed into the spreadsheet and compared on the basis of average net profits.

## RESULTS

The nonlinear functions (eq. 1, eq. 2) adequately described host-parasite relationships in both crops. Sums of squares ratios and standard errors of parameter estimates indicated good fitting to the field data (Table 2). However, estimation of the damage function parameter *b* in the soybean analysis was poor, with a standard error greater than the parameter estimate. This indicates considerable variability in the data with respect to the optimum shape of the damage function. Coefficients of variation within most of the data ranges (Table 1) were high, as expected for field data, and this variation is reflected in the least-squares parameter estimation.

Estimates of maximum (861 kg/ha) and minimum (693 kg/ha) cotton lint yields

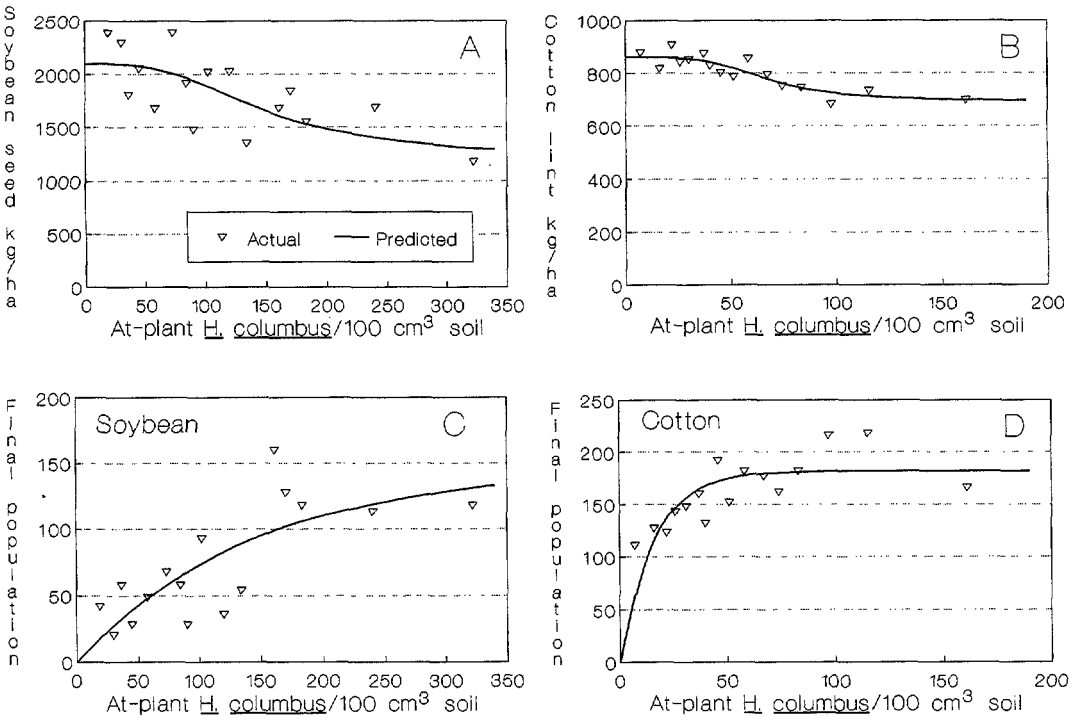


FIG. 1. Damage functions and nematode population increase curves. A, C) Soybean. B, D) Cotton. Parameter estimates and least-squares statistics are in Table 2.

from the damage function (Table 2) reflected a 20% decrease in yield in response to increasing nematode numbers. Parameter estimates for maximum (2,100 kg/ha) and minimum (1,210 kg/ha) soybean seed yields indicated a potential 42% decrease as nematode numbers increased. Estimates of maximum at-harvest nematode densities were 182/100 cm<sup>3</sup> soil in cotton population increase functions, and 149/100 cm<sup>3</sup> soil in soybean.

Fitted curves and data points shown in Figure 1 demonstrated the flexibility of the functions used and the goodness of fit obtained with nonlinear least-squares parameter estimation. Greater yield decrease and increased variability in the data for soybean were demonstrated by comparison of the damage function figures for soybean and cotton (Fig. 1A, B). Also, a greater rate of population increase and higher estimated at-harvest nematode counts for cotton were shown in a comparison of the population curves (Fig. 1C, D). Although variable, expected trends were evident in the scatter plots of frequency-class data.

Microcomputer spreadsheet analyses of all possible 3-year rotations resulted in a wide range of projected 3-year average net incomes. With a beginning *H. columbus* population density of 350/100 cm<sup>3</sup> soil (the highest density analyzed) projected net incomes ranged from a loss of -\$17.74/ha for the soybean-cotton-soybean (s-c-s) sequence, to a net profit of \$46.80/ha for the cotton-soybean-cotton (c-s-c) sequence (Fig. 2A). Thus, under the worst-case scenario with respect to nematode pressure, appropriate cropping sequence selection reversed a net-loss situation into a profitable enterprise. In the same analysis, rotation to 1 year of soybean (c-s-c) was more than twice as profitable as the monoculture of cotton (c-c-c) (net profit of \$20.26/ha) (Fig. 2A).

After the spreadsheet analyses were recalculated with an increase in the projected price of soybean seed to \$0.26/kg, the s-c-s rotation was more profitable than c-s-c up to an at-plant *H. columbus* density of 160/100 cm<sup>3</sup> soil (Fig. 2B). At nematode population densities higher than 160/100 cm<sup>3</sup>

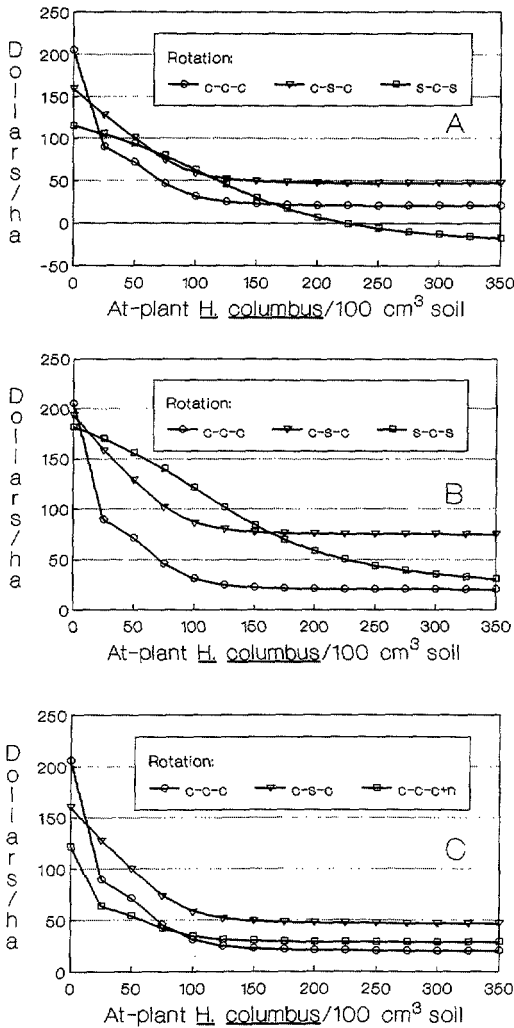


FIG. 2. Projected average net income (profit or loss) for 3-year rotations of cotton and soybean versus increasing nematode numbers. Data were calculated from microcomputer spreadsheet analysis based on damage functions and population increase curves in Figure 1 and economic data. Rotations are cotton-cotton-cotton (c-c-c), cotton-soybean-cotton (c-s-c), and soybean-cotton-soybean (s-c-s). A) Calculated using economic data given in methods. B) Change in relative profitability of rotations after increasing the assumed price of soybean from \$0.21 to \$0.26/kg seed. C) Evaluation of economic impact on the c-c-c sequence from addition of a nematicide (c-c-c+n) which reduces crop damage by 50% and costs \$84.00/ha.

soil, the c-s-c rotation was again more profitable. The monoculture of cotton (c-c-c) was the least profitable sequence in this comparison, as expected with the higher projected price for soybean. This recal-

ulation showed the sensitivity to commodity prices of projected results and demonstrated the utility of the analyses in the calculation of crop-sequence recommendation thresholds.

A third spreadsheet recalculation was based on assumptions related to application of a hypothetical nematicide to cotton which decreased crop damage by 50% and increased fixed costs by \$84.00/ha. The 50% decrease in crop damage was implemented by refitting the parameters of the cotton damage function to reflect the new density-dependent levels and including the new damage function parameters in the spreadsheet setup variables. The cost of application was added to the fixed costs for cotton. The recalculated analysis showed that nematicide application increased net profits by \$9.00/ha at *H. columbus* population densities higher than 100/100 cm<sup>3</sup> soil in the c-c-c vs. c-c-c+n sequence comparison (Fig. 2C), whereas rotation to 1 year of soybean (c-s-c) with no nematicide was still the most profitable alternative. This analysis showed the utility of the analytical system for evaluating the potential profitability of alternative management tools over a range of nematode densities. As in the preceding analysis, thresholds for selection of cropping sequences or alternative management practices can be determined from examination of the resulting profitability curves.

## DISCUSSION

Quantitative optimization is potentially a powerful tool in the analysis of crop rotations and other nematode management practices. Using a limited base of field data and various economic assumptions, we were able to construct a microcomputer spreadsheet analysis that responded logically to increasing nematode population densities and was sensitive to crop sequencing, as well as to the impact of nematicidal treatment.

Our field data were collected by methods specifically designed for analysis of quantitative host-parasite relationships. It is possible that data available in the literature

could prove useful in constructing similar systems. Our estimates of potential yield losses were within ranges previously reported for *H. columbus* on cotton (21,32) and soybean (6,38,47), and estimates of reproduction and at-harvest nematode numbers on soybean were similar to those previously reported (6,38,47). We were unable, however, to find published information on damage functions and reproductive curves, or sufficient data to construct these functions.

Although our estimates of total damage and reproductive capacity may be within published ranges, we have not attempted to represent a verified or validated system. The base of data used to construct the quantitative functions reported was not extensive enough to allow generalizations. Variation in the data was typically high, and more information would be required to construct an applied management system.

The impact of different cultivars, growing seasons, and soil types also must be considered. Isolated effects of each of these factors could easily be factored into the formulations used for damage functions and population dynamics. However, our purpose was to demonstrate the potential usefulness of a quantitative optimization approach using natural agroecosystem data and economic information. With slight modification, most crop rotation studies could provide data suitable for similar analytical procedures, thus enhancing the potential impact and applications of resulting information.

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