Introduction

Tree selection does not end with choosing the appropriate species or cultivar for the planting site. Suitable nursery stock must be chosen based on planting site conditions and intended after-care, which should dictate maximum tree size at planting, root ball characteristics, appropriate tree production method, and tree structure.

Nursery stock must be inspected carefully to pick high quality trees. Pay particular attention to roots. Trees of poor quality may be inexpensive, but might perform poorly in the landscape. Quality factors to evaluate include root ball defects, size, shape, and structure of the canopy, nursery planting depth, presence of included bark, trunk form and branch arrangement, pruning cuts, presence of pests and disease, leaf color, top die-back, clear trunk length, and canopy uniformity.

Important considerations for selection

There are advantages to selecting good quality nursery trees. Good quality trees are more likely to survive post-planting, establish more quickly, and live longer in the landscape. Choosing a good quality tree also can reduce the likelihood of failure from structural defects during a hurricane. Defects in the trunk and branch structure are easier to correct than defects in the root system. This makes it very important to choose trees from a grower with a demonstrated capacity to produce good root systems. Smart buyers evaluate root systems thoroughly.
To ensure greater transplant survival, choose trees grown in the nursery production system best suited for the characteristics of the planting site. Under ideal conditions, i.e. well-drained and irrigated soil, production methods perform about equally well. However, if irrigation capabilities will be limited, the production method best suited for the site is an important consideration.

There are three main types of production methods: container, field-grown (balled-in-burlap or B&B), and bare root (Figure 1). Container trees are grown above ground in plastic, metal, wood, or fabric; pot-in-pot in the ground; or in fabric containers in the ground. B&B trees are grown in field soil, then dug with a tree spade and secured in wire and burlap. Bare-root trees are rarely marketed in the southeastern U.S. including Florida. Bare-root deciduous trees are dug from field soil and receive no media covering on the roots; they are usually available only when dormant and in a limited size range.

Table 1 compares production methods with typical root ball weights and staking requirements. For example, trees produced in containers typically have a light root ball and frequently require staking, whereas B&B trees have heavy root balls, so they require staking less frequently.

Table 1. Choose among tree production methods based on weight and staking capabilities.

<table>
<thead>
<tr>
<th>PRODUCTION METHOD</th>
<th>ROOT BALL WEIGHT</th>
<th>NEED FOR STAKING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container above ground or pot-in-pot</td>
<td>light</td>
<td>frequently</td>
</tr>
<tr>
<td>Fabric containers in ground</td>
<td>light</td>
<td>usually</td>
</tr>
<tr>
<td>B&amp;B* not root pruned</td>
<td>heavy</td>
<td>sometimes</td>
</tr>
<tr>
<td>B&amp;B* root pruned</td>
<td>heavy</td>
<td>sometimes</td>
</tr>
<tr>
<td>Bare root</td>
<td>very light</td>
<td>usually</td>
</tr>
</tbody>
</table>

*B&B = field grown

Trees perform best when irrigated frequently after planting. If irrigation can be applied to the root ball twice weekly or more often, the production method may have little impact on tree survival. For landscapes where irrigation is less frequent, much of the research shows that it is best to install B&B trees that were root pruned during field production and dug at least several weeks before planting to the landscape (Table 2). These trees are referred to as “hardened off” (Figure 1, bottom) and frequently have new roots growing through the burlap. Root pruning live oak and some other trees during production provides a product that is slightly smaller, has a denser, more fibrous root system, has a more uniform root system (Figure 2), and transplants more successfully. Oaks grown in certain soil types may need less frequent root pruning than in other soil types, although this has been not been thoroughly documented.

Certain trees that are dug from sandy, well-drained soil without prior root pruning suffer more shock in the landscape, especially when not sufficiently watered. Some trees such as crape myrtles, maples, birches, hollies, and others are not routinely root pruned like oaks. In many instances, these seem to perform fine without root pruning due to their naturally dense root system.
Table 2. Live oak survival in the landscape can depend on the production method and irrigation practices after planting.

<table>
<thead>
<tr>
<th>PRODUCTION METHOD</th>
<th>SURVIVAL WITH FREQUENT IRRIGATION AFTER PLANTING</th>
<th>SURVIVAL WITH INFREQUENT IRRIGATION AFTER PLANTING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Container above ground or pot-in-pot</td>
<td>very good to excellent</td>
<td>fair</td>
</tr>
<tr>
<td>Fabric containers in ground</td>
<td>very good to excellent</td>
<td>poor to fair</td>
</tr>
<tr>
<td>B&amp;B not root pruned</td>
<td>fair to good</td>
<td>poor to fair</td>
</tr>
<tr>
<td>B&amp;B root pruned</td>
<td>very good to excellent</td>
<td>good</td>
</tr>
<tr>
<td>Bare root</td>
<td>very good to excellent</td>
<td>good</td>
</tr>
</tbody>
</table>

1 Research performed on live oak in sandy, well-drained soil. Other species and trees grown in different soil types may perform differently.

Maximum size at planting

The maximum size nursery stock suited for a particular planting site should be determined by the irrigation capabilities after planting, as well as the climate and site drainage. Smaller nursery stock should be used where irrigation can not be provided for the recommended period of time. Nursery trees larger than 2 inch caliper can be poorly suited for wet sites because roots in the bottom of the root ball can become submerged in water. This may stress the trees by killing the deeper roots in the root ball, which can prevent the tree from growing for several years after planting. Smaller nursery stock is the better option for poorly drained sites because they have a shallow root ball. If large trees are necessary, then trees with shallow root balls (trees grown in low-profile containers, Figure 3) should be selected, or trees can be planted 10 to 30% above grade and soil gently mounded to cover sides of the root ball. Smaller trees can be better suited than larger trees to compete with weeds for limited water availability, especially when weeds are not controlled with mulch or chemical applications.
Smaller nursery stock (Figure 4, top) has a shorter establishment period because roots come into balance with the top in the first 6-12 months after planting. Large nursery stock such as the 6-inch-caliper tree pictured in Figure 4 (bottom) requires much more time to become established. This makes it susceptible to dying from drought for a longer period after planting. It can take up to three years for a 6-inch-caliper tree to become established. Unless plenty of water can be supplied, it may be best to plant smaller nursery stock.

Root ball dimensions

The shape and depth of the root ball may be an important consideration for poorly drained soils. Root balls of any shape perform equally well in well-drained soil. Tall root balls help keep deeper roots moist. Wide and shallow root balls are better suited for planting in poorly-drained and compacted sites but dry more quickly on well-drained sites (Figure 3). Again, irrigation and site drainage are important considerations. A tall root ball may be more appropriate if irrigation will be infrequent or the site soil drains quickly because the deep roots stay moist longer.

Root collar location

The area where the topmost roots meet the trunk is referred to as the root collar or root flare. If it is buried too deeply in the root ball, the tree could decline over time due to lack of oxygen for the root system. Trees can also decline from roots growing over the flare and forming stem-girdling roots. If the trunk emerges from the soil like a telephone pole, without any swelling or root flare, then soil should be excavated away from the trunk base to determine where the root flare is located (Figure 5). Remove soil or media around the base of the trunk until you locate the root flare or the area where the top most roots emerge from the trunk. The topmost major root should be no deeper than one inch from the surface of the root ball (Figure 5, bottom).

Do not purchase trees that were planted too deeply (Figure 6). If you have already purchased one, soil, media, and roots growing above the original topmost root should be mostly removed prior to planting.
Root defects

Root ball defects can occur on any tree regardless of the production method. Once formed, these severe defects close to the trunk are time consuming or impossible to correct and can reduce the capacity of landscape plants to survive and grow. These problems are difficult to spot because they can be buried inside the root ball (Figure 7). Types of root defects include circling roots, kinked roots, stem girdling roots, and root-bound trees.

Trees with severe circling roots should not be planted (Figure 7). Roots circling close to the trunk can eventually slow growth and girdle the trunk. Circling roots at the top of the root ball are especially troublesome. Few roots grow from the outside edges of circling roots, making the tree unstable and more likely to blow down during hurricane-force or even lesser winds.

Kinked roots are roots that have been deflected and turned back on themselves almost 180 degrees. They occur mostly when roots are folded into a propagation tray or container at the liner stage. Water and sugars have a difficult time passing this severe turn in the root, and kinked roots do not provide the mechanical support straight roots do. Kinks in small roots are much less of a concern than kinks in a large root (Figure 8).

Stem-girdling roots are formed when new roots grow perpendicular to a cut root, or when the tree is growing in a container too long. As the trunk increases in diameter, these roots may meet the trunk and begin to strangle it, hence the term stem-girdling roots. The trunk may become severely indented where the root was girdling it; this can cause trunk and root decay, which reduces the tree's ability to stand up, especially in a hurricane (Figure 9).

Root-bound trees have many roots circling around the outside of the root ball (Figure 10), which causes a physical barrier, sometimes preventing the tree from spreading roots into the landscape soil after planting. All these roots should be cut when trees are potted to a larger container and when planting to the landscape.
A quick test can be performed to check root quality. When you push the trunk back and forth, the trunk on a good quality tree will bend along its length and will be firm in the soil or medium. The trunk on a tree with a defective root system will often pivot at its base and will lean over quite a way before it bends (often caused by circling roots when a tree was in a smaller container) (Figure 11). While passing this test does not eliminate trees with root defects, it is a good way to determine if there are severe defects close to the trunk.

Root ball caliper: height relationship

The American National Standards Institute and Florida Grades and Standards for Nursery Stock recommend minimum root ball sizes for nursery-grown trees based on trunk diameter or tree height, and the different kinds of containers they were grown in (Table 3). For instance, a field-grown tree with a trunk caliper of 3 inches should have a minimum 32-inch-diameter root ball and should be between 12 and 16 feet tall. Adhering to these standards helps trees to establish successfully in the landscape.

<table>
<thead>
<tr>
<th>TRUNK CALIPER</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>MIN. BALL DIAMETER ON FIELD-GROWN SHADE TREES</td>
<td>16</td>
<td>24</td>
<td>32</td>
<td>42</td>
<td>54</td>
</tr>
<tr>
<td>MIN. BALL DIAMETER ON FABRIC-CONTAINER-GROWN TREES</td>
<td>12</td>
<td>18</td>
<td>20</td>
<td>30</td>
<td>36</td>
</tr>
<tr>
<td>MIN. CONTAINER SIZE (GALLONS)</td>
<td>5</td>
<td>20</td>
<td>45</td>
<td>95</td>
<td>95</td>
</tr>
<tr>
<td>MIN. TREE HEIGHT ON STANDARD TREES</td>
<td>6</td>
<td>10</td>
<td>12</td>
<td>14</td>
<td>--</td>
</tr>
<tr>
<td>MAX. TREE HEIGHT</td>
<td>10</td>
<td>14</td>
<td>16</td>
<td>18</td>
<td>--</td>
</tr>
</tbody>
</table>

1 Caliper is trunk diameter 6 inches from soil surface unless diameter is greater than 4 inches, in which case it is measured at 12 inches from soil surface.

Archival copy: for current recommendations see http://edis.ifas.ufl.edu or your local extension office.
Trunk form and branch structure

Choosing a nursery tree with good structure can postpone future pruning and maintenance. Trees with poor structure could require more pruning cuts, and a greater portion of the canopy will have to be removed to correct defects.

Shade trees of lesser quality have two or more trunks. Best quality shade trees have one dominant trunk (Figure 12). Multiple leaders represent weakness and can cause the tree to split apart as it grows. Some smaller ornamental trees such as crapemyrtle, ligustrum, wax myrtle, and others naturally have multiple trunks and this does not have to be corrected. Major branches and trunks should not touch, and branches should be less than \( \frac{2}{3} \) trunk diameter (Figure 13).

Other factors influencing tree quality

Though the qualities of the root ball and tree structure are the main considerations, there are some other important factors. Tree wrap should be removed so that the trunk can be inspected for hidden wounds. The trunk can be rewrapped after inspection to prevent wounding during shipping. Trees with large trunk injuries should be avoided.

Canopy uniformity is less important than trunk form and branch arrangement. However, a uniform canopy represents a detail accomplished by attentive growers. Trees with an irregular canopy, one dominant trunk, and good branch arrangement are far better than trees with a uniform canopy and a double trunk with included bark (Figure 14). The canopy on well-structured trees will fill in as the tree grows. Canopy fullness depends on the tree species or cultivar in question. Thin canopies do not necessarily mean that the trees are poor quality, diseased, or infested with insects, since species and cultivars vary greatly in this characteristic. Some trees, such as trumpet tree, Shumard oak and gumbo limbo, are naturally thin when they are young.

Evaluate pruning cuts to determine the quality of the nursery stock. Properly made pruning cuts are clean and made on live wood with minimal clefting. Well-chosen cuts result in trees with well-spaced branches. Trees with inferior canopy uniformity may have poor branch structure and may grow poorly in the landscape. However, some trees such as mahogany and trumpet tree are naturally more open and thin.
cuts indicate that the nursery has high pruning standards and is capable of growing high-quality trees (Figure 15). Improper cuts indicate a poor understanding of tree care and biology.

Trees propagated from plants in the same area as the planting site are likely to be perfectly adapted to the climactic conditions of the site; such trees are rarely available. Tree cultivars have been developed and varieties have been selected for tolerance of cold temperatures, high soil pH, drought, pests and diseases, etc. that are well suited to a wide range of planting sites.

Other concerns are foliage color and staking. Foliage can be discolored for a number of reasons. Discoloration can be a result of nutrient deficiencies. Stakes should be removed from trees before purchasing to assure that the trees can stand unassisted if caliper is more than 1.5 inches.

Figure 16 shows good quality field and container trees. Trees have one dominant trunk, the branches are not crossing, and the canopies are full and uniform. Trees of good quality are more likely to withstand strong winds in the event of a hurricane or tropical storm.

For more information, visit:

American National Standards Institute (ANSI)
http://www.ansi.org/

Florida Grades and Standards
http://www.doacs.state.fl.us/pi/pubs.html

For current recommendations see http://edis.ifas.ufl.edu or your local extension office.