

# Gains and losses of the epiphytic lifestyle in epidendroid orchids: review and new analyses of succulence traits

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Géromine Collobert, Benoît Perez-Lamarque, Jean-Yves Dubuisson, Florent Martos. Gains and losses of the epiphytic lifestyle in epidendroid orchids: review and new analyses of succulence traits. Annals of Botany, 2023, 132 (4), pp.787-800. 10.1093/aob/mcad145 . hal-04943807

# HAL Id: hal-04943807 https://hal.science/hal-04943807v1

Submitted on 12 Feb 2025

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## 1 RESEARCH IN CONTEXT

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3	Gains and losses of the epiphytic lifestyle in epidendroid orchids: review and new
4	analyses of succulence traits
5	
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18	* These authors co-supervised this work.
19	
20	Word count: 9567
21	Tables: 1
22	Figures: 3
23	Supplementary data file(s): 1

#### 1 ABSTRACT

2

#### **3 Background and Aims**

Epiphytism has evolved repeatedly in plants and has resulted in a considerable number of
species with original characteristics. Because the water supply is generally erratic compared
to soils, succulent forms in particular are widespread in epiphytic species. However, succulent
organs also exist in terrestrial plants, and the question of the concomitant evolution of
epiphytism and succulence has received little attention, not even in the epidendroid orchids,

9 which account for almost 67% of vascular epiphytes.

## 10 Methods

We built a new time-calibrated phylogenetic tree of Epidendroideae with 203 genera treated in *Genera Orchidacearum*, from which we reconstructed the evolution of epiphytism as well as traits related to water scarcity (stem and leaf succulence and the number of velamen layers), while testing for the correlated evolution between both. Furthermore, we estimated the ancestral geographic ranges to evaluate the paleoclimatic context in which epiphytism evolved.

## 17 Key Results

Epiphytism evolved at least three times: 39.0 Myr ago in the common ancestor of the
Malaxideae and Cymbidieae that likely ranged from the Neotropics to Southeast Asia and
Australia, 11.5 Myr ago in the Arethuseae in Southeast Asia and Australia, 7.1 Myr ago in the
neotropical Sobralieae, and was notably lost in the Malaxidiinae, Collabieae, Calypsoeae,
Bletiinae, and Eulophiinae. Stem succulence is inferred to have evolved once, in a terrestrial
ancestor at least 4.1 Myr ago before the emergence of epiphytic lineages. If lost, stem
succulence was almost systematically replaced by leaf succulence in epiphytic lineages.

## 1 Conclusions

2 Epiphytism may have evolved in seasonally dry forests during the Eocene climatic cooling,

3 among stem-succulent terrestrial orchids. Our results suggest that the emergence of stem

4 succulence in early epidendroids was a key innovation in the evolution of epiphytism,

- 5 facilitating the colonisation of epiphytic environments that afterwards led to the greatest
- 6 diversification of epiphytic orchids.
- 7

## 8 Keywords:

- 9 Epidendroideae, Orchidaceae, vascular epiphytism, pseudobulbs, succulence traits, velamen,
- 10 ancestral reconstruction, key innovation, Genera Orchidacearum, hidden Markov model

11 (HMM).

#### **1 INTRODUCTION**

2

3 Epiphytism, or the ability of some plants to grow on the surface of other plants, is a major component of tropical and subtropical forests on Earth (Benzing, 1990; Zotz, 2016), 4 5 representing about 9% of global vascular plant diversity (Zotz, 2013, 2016), and up to 50% of 6 the plant species in some tropical rainforests (Silvera and Lasso, 2016). Among epiphytes, 7 orchids are of particular interest, as they alone account for around 67% of all epiphytic 8 species (21,169 out of 31,311; (Zotz et al., 2021)), and almost all of them belong to the 9 Epidendroideae (Zotz, 2013), the largest subfamily of Orchidaceae. Givnish et al. (2015) 10 demonstrated that several factors, including epiphytic lifestyle and tropical distribution, were 11 associated with higher net diversification rates in orchids. Although they did not specifically 12 address the evolution of epiphytism in the Orchidaceae, their taxon sampling (162 species 13 belonging to 18 tribes) allowed them to identify at least one transition to the epiphytic lifestyle at the orchid family level, in the subfamily Epidendroideae, but this analysis was 14 15 carried out at the level of subtribes only. Two other ancestral estimations of lifestyle evolution 16 were conducted on more extensively sampled phylogenies, including 335 orchid species 17 (Chomicki et al., 2015) and 312 Epidendroideae species (Freudenstein and Chase, 2015), 18 respectively. Freudenstein and Chase (2015) detected at least three independent origins of the 19 epiphytism in Epidendroideae, challenging the primary single origin of the epiphytic lifestyle found by Givnish et al. (2015) and Chomicki et al. (2015). While the latter group includes 20 21 mainly epiphytic taxa in the tribes Cymbidieae and Vandeae, the former group comprises both 22 terrestrial lineages that are rather basal in the tree and more recent epiphytic lineages, like the 23 Dendrobiinae which include the genus *Bulbophyllum*. In addition, confirming the early 24 assumption of Dressler (1981), these studies found multiple re-terrestrialization events

(Chomicki *et al.*, 2015; Freudenstein and Chase, 2015; Givnish *et al.*, 2015). Indeed, several
lineages nested in the Epidendroideae diversify on the ground and show features similar to
related epiphytic lineages, suggesting that reversions from the epiphytic lifestyle to the
terrestrial lifestyle may have occurred in more recent times. Finally, recent phylogenetic
works reappraising the phylogenetic relationships in Epidendroideae using genomic molecular
data (Givnish *et al.*, 2015; Li *et al.*, 2019; Serna-Sánchez *et al.*, 2021; Pérez-Escobar *et al.*,
2021) now provide a robust phylogenetic framework to assess the evolution of this group.

9 Although diverse and heterogeneous in terms of environmental conditions, epiphytic habitats 10 are characterised by an irregular water supply for plants (Benzing, 1987; Cribb, 1999; Zotz, 11 2016; Taylor et al., 2022; Hietz et al., 2022). Water shortage in epiphytic habitats could 12 explain why water catching and storing organs are commonly observed among epiphytic plants, such as the tank-forming leaves holding water in some bromeliads (Givnish et al., 13 14 2014; Zotz, 2016). Most epiphytic orchids and many Araceae have one or more layers of dead 15 epidermal cells surrounding the root, called a velamen, which helps to capture water running 16 off the surface of the tree (Cribb, 1999; Zotz and Winkler, 2013; Stern, 2014). Thickened 17 stems and leaves are also common to conserve and store water and nutrients to compensate 18 for their irregular supply (Cribb, 1999; Ng and Hew, 2000; Stern, 2014; Zotz, 2016; Yang et 19 al., 2016; Niechavev et al., 2019; Hietz et al., 2022; Fu et al., 2022). In addition, 20 Crassulacean Acid Metabolism (CAM) is a water-conserving trait widespread among 21 epiphytic plants (Luttge, 2004; Zotz, 2016; Niechayev et al., 2019; Hietz et al., 2022; Fu et al., 2022; Orlov et al., 2022). With approximately 2100 species, the pantropical genus 22 23 Bulbophyllum in Epidendroideae illustrates the ecological and evolutionary success of these 24 characters (Gravendeel et al., 2004; Gamisch and Comes, 2019). Even though traits related to

1 water scarcity (including succulence) were found to be more pronounced in epiphytes than in terrestrial species (Rada and Jaimez, 1992; Zhang et al., 2015; Hietz et al., 2022), justifying 2 3 an 'epiphytic syndrome' according to Hietz et al. (2022), these features are not exclusive to epiphytes, as they are also found in terrestrial plants (Zhang et al., 2015; Zotz et al., 2017; 4 5 Hietz et al., 2022). For example, the velamen is a typical feature of epiphytic orchids, but is also found in numerous terrestrial genera in many families, with *a priori* no epiphytic 6 7 ancestors from which they could have retained this feature (Zotz et al., 2017). Therefore, as 8 stated by Zotz (2016): 'in the absence of phylogenetic analyses, it usually remains unclear 9 whether a feature really represents an adaptation, or whether previously evolved traits simply 10 proved to be advantageous in an epiphytic environment'. The second scenario would 11 correspond to a key innovation as defined by Miller et al. (2023): 'an organismal feature that 12 enables a species to occupy a previously inaccessible ecological state'.

13

14 Dressler (1981) hypothesized that water-deprived traits could have evolved as adaptations to 15 drought in seasonally dry tropical climates in terrestrial orchids, later facilitating the 16 transitions to the epiphytic niches. Indeed, an ancestral state estimation carried out by 17 Freudenstein and Chase (2015) suggested that the succulent stems, called pseudobulbs, 18 common in modern epiphytic orchids could indeed have arisen before the evolution of the 19 epiphytic lifestyle, but the method they used nevertheless returned an uncertain state. In the 20 present study, we aimed to test Dressler's hypothesis, *i.e.* did traits related to water scarcity 21 appear in epiphytic lineages as adaptations (*i.e.* the adaptation hypothesis) or did they emerge 22 first in terrestrial ancestors as features that facilitated access to novel ecological states, here 23 the epiphytic environment (*i.e.* the key innovation hypothesis)? To address these questions, 24 we (i) analysed the evolutionary history of the epiphytic lifestyle and water-related traits in a

single state-of-the-art analysis, using the most recent and robust phylogeny and methods
available; (ii) ascertained the likelihood of an emergence of succulence traits prior to the
epiphytic lifestyle and estimated if transitions from terrestriality to the epiphytic lifestyle were
more frequent among drought-adapted lineages; and (iii) identified the paleoclimatic context
of the evolution of epiphytism, *i.e.* when and where water-related and the epiphytic lifestyle
arose and were lost.

7

#### 8 MATERIALS AND METHODS

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10 Phylogenetic analysis of Epidendroideae genera and divergence times

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12 In order to produce a well-sampled, robust, time-calibrated phylogenetic reconstruction of the 13 Epidendroideae at the genus level, we used a molecular dataset of three plastid genes (*matK*, *psaB*, *rbcL*). Sequences were retrieved from GenBank for 203 placeholders representing each 14 15 genus of Epidendroideae listed in Genera Orchidacearum (Pridgeon et al., 2005, 2009, 2014). 16 Whenever possible, all gene sequences came from the same voucher specimen (69% of the 17 genera), and if not from different specimens of the same species (14%), or from different 18 species (17%). GenBank accession numbers are provided in Supplementary DataTable S1. 19 Name acceptance by the WCSP (2020) of vouchers and genera was systematically checked. 20 Although synonyms of *Dendrobium*, *Cadetia* and *Epigeneium* were kept for reasons of fossil 21 calibration (see below). Sequences of each gene were aligned using MAFFT in Geneious 22 Prime 2021.2, manually checked, and then concatenated, resulting in a molecular dataset of 23 4649 characters. Best-fitting partition scheme was selected using ModelFinder in IQ-TREE 24 1.6.12 (Kalyaanamoorthy et al., 2017).

1

2 A phylogenetic analysis based on these three genes is unlikely to provide strong support for 3 the deep relationships between the genera of Epidendroideae, but tribe relationships in Epidendroideae have been studied several times using 74 to 78 plastid genes (Givnish et al., 4 5 2015; Li et al., 2019; Serna-Sánchez et al., 2021; Pérez-Escobar et al., 2021). Here we used 6 the multispecies coalescent tree inferred from 78 plastid genes by Pérez-Escobar et al. (2021) 7 as a backbone tree for tribe relationships. We used the classification of Genera 8 Orchidacearum (Pridgeon et al., 2005, 2009, 2014) to circumscribe tribes and assign genera 9 to them, while correcting by the phylogenetic relationships of Pérez-Escobar et al. (2021). We 10 hereafter used the supra-generic classification of Chase et al. (2015) for convenience, with the 11 exception of the genus Coelia that we have kept in the subtribe Coeliinae (instead of 12 Calypsoinae).

13

14 Dated tree inference from the molecular dataset was performed in BEAST 2.6.6 (Bouckaert et 15 al., 2019), with the backbone tree input as multiple monophyletic constraints. The stem age of 16 *Earina* and the crow age of *Dendrobium* (including *Cadetia* and *Epigeneium*) were calibrated 17 with the fossils of Earina fouldenensis and Dendrobium winikaphyllum (both dated at 23.2 18 Myr; (Conran et al., 2009), respectively. The crown age of Epidendroideae was calibrated 19 using the fossil of *Succinanthera baltica* estimated at least at 45 Myr (Poinar and Rasmussen, 20 2017). Despite having only been tentatively assigned to Epidendroideae but not to any extant 21 tribe, this fossil allows to put a minimal age to the Epidendroideae subfamily. Calibration 22 points were set with a log-normal distribution of mean = 1, and of standard deviation (SD) = 1.25 for the two points at 23.2 Myr, and SD = 2 for the crown age of Epidendroideae. The 23 24 higher SD on the calibration of the root of the Epidendroideae allows the node to take much

1 older values, encompassing the uncertainty of both the age estimation and the phylogenetic 2 position of Succinanthera baltica. We set a relaxed uncorrelated log-normal molecular clock, and the birth-death process as tree prior. A diffuse gamma distribution ( $\alpha = 0.001$  and  $\beta =$ 3 1000) was applied to both clock mean and birth rate priors. Other priors were left as default. 4 5 Site model averaging using bModelTest 1.2.1 was performed, as recommended by Bouckaert and Drummond (2017), with mutation rate estimated and fixed mean substitution rate. We 6 7 performed two CoupledMCMC runs of 200 million steps each with eight chains, resampling 8 every 20,000 steps. Stationarity and convergence of runs were assessed using Tracer 1.7.1, 9 and trees were combined using LogCombiner 2.6.6 after discarding the first 12% as burn-in. 10 A maximum clade credibility (MCC) tree with median node heights was calculated using 11 TreeAnnotator 2.6.6.

12

13 Lifestyle and water-related trait data set

14

15 To estimate their evolutionary history, we scored the occurrence of epiphytic lifestyle and 16 water-related traits (see bellow) at the generic level, using Genera Orchidacearum (Pridgeon 17 et al., 2005, 2009, 2014). While many traits are related to water limitations, such as specific 18 leaf area or water-use efficiency (e.g. Zhang et al., 2015; Hietz et al., 2022), only 19 morphological water-related traits were available. We thus retrieved the presence of stem 20 succulence (with two modalities if present: heteroblastic (one internode swollen) or 21 homoblastic (several internodes swollen) pseudobulbs/corms); the presence of leaf succulence 22 (including coriaceous leaves); and the minimum and maximum number of velamen layers 23 (also from Stern (2014) and Porembski and Barthlott (1988)) (Fig. 1). With regard to the 24 lifestyle, 35 genera included lithophytic species, but this lifestyle is sometimes equivocal

(Zotz, 2013, 2016), and as none of the genera sampled were entirely lithophytic, we did not
consider it. The genera were therefore assigned as epiphytic and/or terrestrial. With regard to
the leaf thickness, 14 genera (6.9%) were leafless, *i.e.* mycoheterotrophic (Fig. 2). For all
categorical traits, states were mutually non-exclusive, *i.e.* genera could include both epiphytic
species and terrestrial species (see frequencies of each state in Supplementary Data Table S2).
The number of velamen layers was missing for 66 genera out of 203 in the phylogeny
(32.5%).

8

#### 9 Test of correlated evolution between epiphytism and succulence traits

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11 Because the epiphytic habitat is characterised by irregular water-supply, epiphytic lifestyle 12 and succulent organs could have evolved in a correlated way. To test for their potential 13 correlated evolution throughout the phylogeny, we used the discrete dependent/independent approach implemented in BayesTraits v4.0.0. For a given trait, we compared the fit of a 14 15 model where the epiphytic lifestyle and this trait evolved in a correlated way ("dependent 16 model") to the fit of a model where both traits evolved independently ("independent model") 17 using Bayes Factors (BF). We ran a reverse-jump (with an exponential prior of mean 10) 18 MCMC analysis for each model, with 5,500,000 iterations, a burn-in of 500,000, and used the 19 stepping stone sampler (Xie et al., 2011) with 500 stones and 5000 iterations per stone. 20 Stationarity and convergence of two runs per model were assessed in Tracer v1.7.1. The log 21 BF were computed from the resulting marginal likelihoods, as 2\*(log marginal likelihood the 22 dependent model - log marginal likelihood the independent model). We considered a BF > 223 to be significant support for the dependent model.

24

1 The test was replicated with another method, *i.e.* using the package corHMM v2.7.1 in R v4.2.1 (R Core Team, 2022), which is a Hidden Markov model designed to allow for the 2 3 correlated evolution of several characters when estimating transition rates and inferring ancestral states on a phylogeny (Boyko and Beaulieu, 2021). Two symmetric transition 4 5 matrices were used to correlate or decorrelate transition rates between states (Supplementary Data Table S3). The maximum likelihood of each model was computed with the corHMM 6 7 function using 100 random restarts, and best-fitting model was determined by AICc 8 comparison. Compared with BayesTraits, corHMM allows some heterogeneity in the 9 transition rates across the whole phylogeny by assuming that the rates can depend on some 10 unobserved ("hidden") traits.

11

12 Estimation of transitions between ancestral lifestyles and succulence traits

13

14 Freudenstein and Chase (2015) found that succulent stems could potentially have appeared 15 earlier than the epiphytic lifestyle. To ascertain the likelihood of an appearance of succulence 16 traits prior to the epiphytic lifestyle in a temporal framework, transition rates between states 17 were first estimated with corHMM. Polymorphic taxa were included in the analysis, as 18 corHMM can handle multiple states, although this is interpreted as uncertainty by the method 19 rather than polymorphism. We tested models with transition matrices assuming either equal, 20 symmetric, or all-different transition rates, and including or not one hidden rate category. 21 Then, 1000 stochastic character maps of the best-fitting model were generated using the 22 makeSimmap function and then summarised to estimate the posterior probability of each state 23 at ancestral nodes. Number of transitions between correlated states were estimated from the 24 posterior probability distribution of trait changes from the stochastic character mapping.

- 1
- 2 Estimation of ancestral number of velamen layers and test of differences between lifestyles
- 3

For the mean number of velamen layers in the root, we considered the trait to be continuous. 4 5 We used the R function phytools::*anc.ML* (Revell, 2012) with a Brownian Motion model of 6 continuous character evolution to estimate the ancestral states. The caper::pgls function was 7 used to test if the mean number of velamen layers in epiphytic taxa is significantly different 8 from that of terrestrial taxa, while accounting for the phylogenetic relatedness between 9 species. As several genera are both epiphytic and terrestrial, we repeated the PGLS ten times, 10 each time randomly assigning each polymorphic genus to be only epiphytic or terrestrial. 11 12 Ancestral ranges of the Epidendroideae 13 14 To address both the time periods and the biogeographic and palaeoclimatic context of the 15 emergence of the epiphytic lifestyle, we estimated the ancestral biogeographic ranges of Epidendroideae on their time-calibrated MCC tree, using BioGeoBEARS (Matzke, 2013). 16 17 Bioregions were defined as in Givnish et al. (2016): North America, Neotropics, Africa, Eurasia, Africa, Southeast Asia, Australia, and Pacific. The models DEC\*, DEC\*+J, DIVA\*, 18 19 DIVA\*+J, BayArea\*, and BayArea\*+J (excluding a null range) were tested, with a maximal 20 range size of 7, and thus 127 possible states. Time-stratified dispersal multipliers were set 21 following Givnish et al. (2016) (Supplementary Data Table S4). The best-fitting model was 22 chosen by AICc comparison (Supplementary Data Table S5) and likelihood-ratio tests 23 (Supplementary Data Table S6).

#### 1 **RESULTS**

2

3 Phylogenetic relationships and divergence times between Epidendroideae genera

4

5 All epidendroid subtribes *sensu* Chase *et al.* (2015) were found monophyletic in the obtained 6 phylogenetic tree of 203 genera of Epidendroideae, except for the subtribes Cymbidinae and 7 Eulophiinae which were split into two and three clades, respectively. Posterior probabilities 8 (PP) and constrained nodes are presented in Supplementary Data Fig. S1. According to our 9 time-calibration based on three fossils (including a minimal age for the Epidendroideae based 10 on the fossil described in Poinar and Rasmussen (2017)), the crown age of Epidendroideae 11 was estimated at 47.4 Myr (95% Highest Posterior Density (95% HPD) interval = 63.2–45.0 12 Myr). Tribe crown ages and corresponding 95% HPD intervals are summed up in 13 Supplementary Data Table S7. 14 15 Test of correlated evolution between epiphytism and succulence traits 16 17 The evolution of leaf succulence was found to be correlated with the lifestyle using both 18 BayesTraits and corHMM (Table 1). The evolution of stem succulence was found to be 19 correlated with the lifestyle with BayesTraits only, while corHMM returned a non-significant 20 difference in AICc between the correlated and the uncorrelated models (Table 1). As both 21 traits were found significantly correlated using at least one method, we jointly estimated their 22 evolutionary histories with the lifestyle (using correlated matrices of transition between states) in corHMM. 23

24

2

The evolutionary history of the epiphytic lifestyle was consistent across corHMM models, *i.e.* 3 either with models correlated to leaf (Fig. 2) or stem (Supplementary Data Fig. S2) 4 5 succulence. The correlated model of evolution between the lifestyle and leaf succulence (Fig. 2) inferred that the most recent common ancestor (MRCA) of Epidendroideae was likely 6 terrestrial (p = 0.99) and ranged from the Neotropics to Southeast Asia and Australia (p =7 8 0.58). In agreement with Freudenstein and Chase (2015), we found that the epiphytic lifestyle 9 likely appeared at least three times independently in ancestral nodes, namely in (i) the MRCA of Malaxideae and Cymbidieae 39.0 Myr ago (p = 0.98, node PP = 1 (backbone node), 95% 10 11 HPD = 51.7-32.8 Myr) in Southeast Asia and Australia (p = 0.94, Fig. 3), (ii) in the MRCA of 12 Dendrochilum and Panisea in Arethuseae 11.5 Myr ago (p = 0.98, node PP = 0.98, 95% HPD 13 = 18.3-6.3 Myr) in Southeast Asia and Australia (p = 0.94, Fig. 3), and (iii) in the MRCA of Sobralieae 7.1 Myr ago (p = 0.71, node PP = 1 (backbone node), 95% HPD = 17.1–1.7 Myr) 14 15 in the Neotropics (p = 0.98, Fig. 3). 16

17 Likewise, we inferred at least five transitions from the epiphytic lifestyle to terrestriality 18 (secondary terrestrialization) leading to diversification in (i) the MRCA of Oberonioides and 19 *Malaxis* in Malaxideae 17.0 Myr ago (p = 0.89, node PP = 1, 95% HPD = 25.9–10.1 Myr), (ii) in the Collabieae excluding *Eriodes* 22.8 Myr ago (p = 0.97, node PP = 1, 95% HPD = 32.9-20 21 14.5 Myr), (iii) in the MRCA of Calypsoeae 30.3 Myr ago (p = 0.83, 95% HPD = 40.7–22.8 Myr), (iv) in the MRCA of Bletiinae 12.4 Myr ago (p = 0.95, node PP = 1, 95% HPD = 20.7– 22 23 6.1 Myr), and (v) in the MRCA of *Eulophia* and *Oeceoclades* 12.6 Myr ago (p = 0.97, node 24 PP = 0.83, 95% HPD = 18.6-7.5 Myr).

1

2 Using the posterior probability distribution of trait changes from stochastic mapping,

transitions from the terrestrial to the epiphytic lifestyles were estimated to have occurred three
to seven times (95% HPD interval) in the phylogeny with a median of four changes. Reverse
transitions *i.e.*, from the epiphytic to the terrestrial lifestyle, were estimated to have occurred
ten to 16 times (95% HPD interval) in the phylogeny, with a median of 13.

7

8 Gains and losses of drought-related traits (stem succulence, leaf succulence and velamen)
9

10 Ancestral state estimation of stem succulence was consistent either when considering the 11 presence-absence of succulence (Supplementary Data Fig. S3) or when dividing the succulent 12 stems into heteroblastic (one internode swollen) or homoblastic (several internodes in succession swollen) (Fig. 2, Supplementary Data Fig. S4). The absence of stem succulence 13 14 was inferred as ancestral in Epidendroideae (p = 0.80). Confirming the general assumption 15 (Dressler, 1981; Ng and Hew, 2000), stem succulence was inferred to be ancestrally 16 homoblastic, and to have appeared only once, in the MRCA of Nervilieae and Cymbidieae 17 43.1 Myr ago (p = 0.82, node PP = 1 (backbone node), 95% HPD = 57.3–36.6 Myr) (Fig 2, 18 Supplementary Data Fig. S4A) in the Neotropics, Southeast Asia and Australia (p = 0.45, Fig. 19 3) or in Southeast Asia and Australia only (p = 0.45, Fig. 3), thus predating the epiphytic 20 lifestyle by at least 4.1 Myr. 21 Heteroblastic succulent stems evolved repeatedly from homoblastic pseudobulbs at least eight 22 times throughout the phylogeny (distribution of changes from stochastic mapping: 95% HPD 23 [9, 16], median = 12). Stem succulence appeared to have been lost several times. Transition

rates (Fig. S4B) indicated that homoblastic pseudobulbs tended to be either lost (0.02

event/Myr) or to evolve into heteroblastic pseudobulbs (0.011 event/Myr). Heteroblastic stem
 succulence derived predominantly from homoblasty (0.011 event/Myr) rather than from
 absence of succulence (3.5e-5 event/Myr) and was lost as often as it was acquired (0.013
 event/Myr), though mostly at tips (Supplementary Data Fig. S4).

5

Succulent leaves (Fig. 2, Supplementary Data Fig. S5) were inferred to have appeared several 6 7 times convergently (distribution of changes from stochastic mapping: 95% HPD [33, 52], 8 median = 43 in epiphytic taxa; 95% HPD [77, 112], median = 93 in terrestrial taxa), mostly at 9 tips, and particularly during the Oligocene in epidendroid lineages that were probably already 10 epiphytic at that time (*i.e.* in Podochileae, Epidendreae, Vandeae, and at least twice in 11 Cymbidieae). However, even though succulent leaves evolved predominantly in epiphytic 12 groups, some terrestrial taxa also evolved it, for example in genera Oberonioides, Acrolophia, 13 or *Cyrtopodium*. In Vandeae, the appearance of leaf succulence 26.6 Myr ago (p = 0.76, node PP = 1,95% HPD = 36.5–19.3 Myr) was inferred to coincide with the loss of stem succulence 14 15 (p = 0.86, node PP = 1, 95% HPD = 36.5-19.3 Myr).

16

17 The number of velamen layers (Supplementary Data Fig. S6) tended to be ancestrally low in 18 Epidendroideae, and seems to have increased in the MRCA of Panisea and Bulleyia in 19 Arethuseae, in Dendrobiinae, in Collabieae, in Laeliinae, and in most of Cymbidieae, as well 20 as in Govenia (tribe Calypsoeae). In Vandeae, most genera miss data on velamen, thus 21 inheriting ancestral state without change, hence some genera may actually have a high 22 number of velamen layers in this tribe. As expected, primarily terrestrial tribes tended to have 23 only a few velamen layers, but some secondary terrestrial genera, *i.e. Govenia*, *Cyrtopodium*, 24 and the subtribe Eulophiinae have among the highest numbers of layers. All PGLS models

indicated that terrestrial taxa tended to have fewer velamen layers than epiphytic ones, but a
 high number of velamen layers was not significantly associated with epiphytic lifestyle (range
 of F-statistic [2.2–0.099] on 1 and 135 DF, p-value [0.14–0.75]).
 *Transition rates between correlated lifestyle and succulence traits*

6

Using the posterior probability distribution of trait changes from the stochastic character
mapping, we estimated that transitions from terrestrial to epiphytic lifestyles only occurred in
lineages with succulent stems (0.0087 event/Myr, Fig. 2C(i)), while such transitions were
almost impossible in non-succulent lineages (1e-9 event/Myr, Fig. 2C(ii)). Conversely, we
reported that transitions from terrestrial to epiphytic lifestyles occurred in lineages without
thickened leaves (0.0041 and 0.011 event/Myr, Fig. 2D(iii, iv)), with almost no transitions
between terrestrial and epiphytic species with succulent leaves (1e-9 event/Myr, Fig. 2D(v)).

## 15 **DISCUSSION**

16

17 Where and when did the epiphytic lifestyle and succulence traits evolved?

18

The first occurrence of the epiphytic lifestyle in Epidendroideae was inferred at the end of the
Eocene in a range encompassing the Neotropics, Southeast Asia, and Australia (Figs. 2 and
3). Over the course of the Eocene, the global climate gradually became cooler and drier
(Bohaty *et al.*, 2009; Bush *et al.*, 2011), leading to a major retraction of megathermal forests
(Bush *et al.*, 2011) and to the development of new open and drier habitats (Bobe, 2006;
Woodcock and Meyer, 2020). Even though geographical ranges were different between

1 Aizoaceae and Epidendroideae, this origin coincides with the origin of Aizoaceae, an entirely African succulent group (41.5 Myr, 95% HPD = 38.7–56.4 Myr; (Arakaki et al., 2011; Klak 2 et al., 2017). In several groups, succulence evolved in arid desert systems and in semi-arid 3 systems such as savannas (Ringelberg et al., 2020; Anest et al., 2021). Likewise, stem 4 5 succulence in Epidendroideae could have been an adaptation to drier, seasonal forests or savannas. With at least ancestral stem succulence (Fig. 2), epiphytism could have arisen in 6 7 seasonally dry forests or dry microhabitats, maybe primarily on cliffs and rocky areas as 8 hypothesised by Dressler (1981), among taxa already adapted to drought. This conclusion is 9 also consistent with Frenzke et al. (2016), who hypothesised as well that the terrestrial 10 ancestor of epiphytic *Peperomia* (Piperaceae) already showed water-related traits potentially 11 facilitating epiphytic life such as succulence or CAM metabolism.

12

13 In Arethuseae, epiphytism likely appeared during the Miocene in the Southeast Asian and 14 Australian range, when the climate was cooling again after the Mid-Miocene climatic 15 optimum and moist megathermal forests were restricted to the tropical zone, with the 16 exception of the Australasian region (Bush et al., 2011). In Southeast Asia, everwet climates 17 predominated, but some regions could have been wet but seasonal, with open vegetation 18 (Bush et al., 2011). Thus, it is unclear if epiphytic Arethuseae most likely appeared in 19 seasonal or everwet forests, and in addition the ancestral stem succulence could have 20 facilitated the transition to the epiphytic habitat in either environment. Moreover, 21 Coelogyninae are at present predominantly inhabiting everwet forests, and occur less 22 frequently in areas with seasonal climates (Pridgeon et al., 2005). 23

24 Our interpretation that the epiphytic lifestyle could have evolved in seasonally dry forests

1 generally contrast with the presumed evolution of other epiphytic lineages, such as Bromeliaceae (Givnish et al., 2014), ferns (Schuettpelz and Pryer, 2009; Chen et al., 2022), 2 3 Lycopodiaceae (Wikström et al., 1999) or thalloid liverworts (Bechteler et al., 2021), which were rather found to have originated mostly in rainforests or moist montane forests. In some 4 5 of these other taxa, epiphytism is indeed unrelated to drought-tolerant traits, or droughttolerant traits evolved as adaptations to the epiphytic lifestyle. Even among the 6 7 Epidendroideae, the last appearance of the epiphytic lifestyle likely occurred in Sobralieae in 8 absence of any type of succulence 7.1 Myr ago (95% HPD = 17.1-1.7 Myr), at the end of the 9 Miocene, in the Neotropics. In tank bromeliads (Bromeliaceae), epiphytism evolved around 10 5.9 Myr in the late Miocene, in the Atlantic forest region of Neotropics, during a global 11 cooling of the climate, synchronously with the uplift of the Serra do Mar which would have 12 favoured cooler, rainier, more humid conditions in the Atlantic forest region (Givnish *et al.*, 13 2014). Moreover, humid montane habitats were found to have favoured epiphytism in 14 Bromeliaceae (Givnish et al., 2014). By the Miocene, mountain uplift had created abundant 15 topographic relief across the Neotropics (Potter and Szatmari, 2009; Givnish et al., 2014; 16 Martins et al., 2018). The lack of succulent organs in Sobralieae is suggestive that this tribe 17 could have evolved in humid, montane habitats.

18

Nevertheless, the hypothesis that epiphytism in all Epidendroideae evolved in everwet forests should not be rejected: in Epidendroideae the pre-adaptation to drought would also have been beneficial in everwet habitats. Indeed, CAM photosynthesis, a water-conserving metabolism, could have been selected in high rainfall habitats as has been observed for *Bulbophyllum* (Gamisch *et al.*, 2021), and many species of Epidendroideae with succulent organs now grow in the shade of everwet forests (Pridgeon *et al.*, 2005, 2009, 2014). On the other hand, in the genus *Crassula* (Crassulaceae) succulence is also found in species of mesic or wet
 environments, and has been suggested to be evolutionarily conserved after having been
 selected in ancestral dry microhabitats (Fradera-Soler *et al.*, 2021).

4

5 Succulence traits as key innovations for the evolution of epiphytic epidendroid orchids

6

7 Stem succulence likely evolved prior to the epiphytic lifestyle, and epiphytes evolved far 8 more frequently among lineages with thickened stems than among lineages without this 9 feature (Fig. 2). It is likely that stem succulence emerged as an adaptation to water shortage in 10 seasonally dry climates, and that it proved to be advantageous in an epiphytic environment. 11 Moreover, even though stem succulence has sometimes been lost in epiphytic lineages, it was 12 almost systematically offset by the appearance of leaf succulence, as in Vandeae or Pleurothallidinae for example (Fig. 2). We thus propose that stem succulence has been a key 13 14 innovation (as defined by Miller et al. (2023): 'an organismal feature that enables a species to 15 occupy a previously inaccessible ecological state') for the evolution of epiphytism in 16 Epidendroideae.

17

The definition of key innovation as stated by Miller *et al.* (2023) does not include an
enhanced diversification, because, as they explain, 'the expectation that key innovations
should result in increased species richness or adaptive radiation is conceptually problematic
[...] because it conflates two distinct evolutionary phenomena: diversification in species
richness, and shifts in ecology'. Nevertheless, it would be interesting to test the impact of
succulence traits on the diversification of epiphytes (Miller and Stroud, 2021), for example
using trait-dependent diversification analyses such as Hidden State Speciation and Extinction

1 models (Beaulieu and O'Meara, 2016; Herrera-Alsina et al., 2019; Nakov et al., 2019).

However, in order to be accurate these analyses require robust species-level phylogenies, with
a sampling fraction ideally > 50%, which is not the case of the phylogenetic tree we were able
to produce until now. Nevertheless, Givnish *et al.* (2015) detected a shift towards higher
diversification rates in the MRCA of Arethuseae and Cymbidieae, corresponding
approximately to the first appearance of epiphytism, and subsequently including the majority
of epiphytic Epidendroideae. Stem succulence, by facilitating the transition to the epiphytic
lifestyle, would have indirectly enabled diversification bursts within the Epidendroideae.

10 In this study we focused on a few traits, however there are other traits that could also have 11 significantly contributed to the evolution of epiphytism and the diversification of orchids, 12 notably the water-conserving CAM photosynthesis (Silvera et al., 2009; Givnish et al., 2015; 13 Silvera and Lasso, 2016) which is often associated to succulent organs (Niechayev et al., 14 2019). Even though recent studies did not find a link between CAM photosynthesis and an 15 increase in diversification rates, at least in Bulbophyllum (Gamisch et al., 2021; Hu et al., 16 2022), an estimation of the evolution of CAM photosynthesis has been conducted by Silvera 17 et al. (2009) at subtribe and genera levels, then by Givnish et al. (2015) at subtribe level, and 18 in spite of high uncertainties in the ancestral state estimations and/or in tree topology, their 19 results nevertheless indicate that CAM photosynthesis could also have appeared prior to 20 epiphytism. In the future, further investigation of the evolutionary history of CAM 21 metabolism in Epidendroideae could thus be interesting.

22

9

23 Secondary terrestrial genera mostly retained the epiphytic ancestral drought-related traits

24

Epiphytism has probably been lost multiple times during the Oligocene and the Miocene, in 1 different geographical ranges (Figs. 2 and 3). As reported by Chen et al. (2022) in the fern 2 family Polypodiaceae, re-terrestrialization in Calypsoeae likely occurred during the Oligocene 3 in Southeast Asia and the Neotropics, when a glaciation led to the decrease of the area of 4 5 broad-leaved forests and available habitats, likely increasing the competition in upper 6 canopies (Chen et al., 2022). Opening seasonal forests and savannas may have promoted the 7 re-terrestrialization of epiphytes, by allowing more light to reach the floor than broad-leaved 8 forests thus releasing the competition for light in the understorey (Dressler, 1981; Wikström 9 et al., 1999), and by allowing plants to occupy a wider range of habitats (Chen et al., 2022). 10 In Collabieae, Malaxideae, Bletiinae, and Eulophiinae, epiphytism was likely lost during the 11 Miocene. This geological epoch was characterised by fluctuations in the global climate, with 12 rapidly changing environments and temperatures, and by widespread topographic changes 13 which created new habitats (Potter and Szatmari, 2009; Bush et al., 2011), enhancing the 14 diversification of many lineages (Potter and Szatmari, 2009). Hence, as hypothesised by Chen 15 et al. (2022) for Polypodiaceae, it is likely that new habitats created by climate and 16 topographical changes could have favoured the re-terrestrialization and subsequent 17 diversification of the secondary terrestrial clades in Epidendroideae, but also of the epiphytic 18 taxa which seem to have diversified mostly during the Miocene (Supplementary Data Fig. S7, 19 S8). In Eulophiinae, whose diversity is centered on Madagascar (Bone et al., 2015), re-20 terrestrialization occurred between 12 and 13 Myr ago, *i.e.* simultaneously with the 21 appearance of the cactiform stem succulence in the genus *Euphorbia* sections *Goniostema*, Denisophorbia and Deuterocalli which represent about 70% of the diversity of Euphorbia in 22 23 Madagascar (Aubriot, 2012). The cactiform stem succulence has been found to prevail in 24 areas with seasonal drought but a reliable season of precipitation (Evans et al., 2014), which

means that seasonal dry forests may have been present in Madagascar at this time and thus
 could have been favourable to the re-terrestrialization of Eulophiinae.

3

If we examine the evolutionary history of succulence traits in Epidendroideae, it appears that, 4 5 on the whole, secondary terrestrial taxa retained their ancestral succulent stems (Fig. 2). In 6 Calypsoeae and Bletiinae, this stem succulence takes the form of underground corms, while in Malaxideae, Collabieae and Eulophiinae it is pseudobulbs (Pridgeon et al., 2005, 2009). 7 8 However, pseudobulbs are sometimes more or less buried, for example in Collabieae genus 9 Ipsea (Pridgeon et al., 2005; Descourvières, 2011), or in Eulophia graminea (Pemberton et 10 al., 2008). Actually, burying succulent structures could better protect them from above-11 ground temperatures extremes and drought, especially in seasonal climates (Pemberton et al., 12 2008; Kumar et al., 2022). In addition, Kumar et al. (2022) showed that some species in 13 Malaxideae are secondary epiphytes, and that they also retained the perennating organ structure and leaf texture of their parent lineage. This tends to support the hypothesis that 14 15 seasonal forests could have been the cradle to at least part of both epiphytes and terrestrial 16 Epidendroideae diversity.

17

The current ecology of secondary terrestrials is also not exactly the same as the primary terrestrial taxa. Indeed, unlike the primary terrestrial taxa, many secondary terrestrials are also found as lithophytes, or even as occasional epiphytes (Pridgeon *et al.*, 2005, 2009, 2014).
Even though there are differences between the lithophytic and epiphytic habitats, they still share similar rooting conditions (Zotz, 2016), and similar mycorrhizal fungal communities are shared by orchids between the two habitats (Xing *et al.*, 2019; Qin *et al.*, 2020). Moreover, lithophytic Malaxideae were not found on the rock itself but in the humus-rich and mossy

substrate (Hermans *et al.*, 2020), resembling some epiphytic conditions. Even among genera
 that were described as fully terrestrial in *Genera Orchidacearum* (Pridgeon *et al.*, 2005, 2009,
 2014), some may not always really root in the soil.

4

5 While epiphytes tend to have slighly more velamen layers than terrestrials, the re-6 terrestrialization did not particularly lead to a reduction of the number of velamen layers, and 7 this number may have even increased in some secondary terrestrial clades (Supplementary 8 Data Fig. S9). The velamen allows a quick uptake and long retention (increasing with 9 velamen size) of water and nutrients, which is beneficial in environments with low and 10 intermittent water and nutrient supply (Zotz and Winkler, 2013). Other important functions 11 are mechanical protection and, in exposed roots, reduction of heat load (Zotz and Winkler, 12 2013; Zotz et al., 2017) and UV protection (Chomicki et al., 2015). Hence, velamentous roots 13 may have been beneficial in secondary terrestrial taxa with lithophytic-like ecology, whose 14 roots can be exposed to a scarce supply of water and UV radiation as for epiphytic taxa. 15 Furthermore, even rooted in soil, numerous taxa in Orchidaceae and other families are 16 velamentous, for the velamen minimises the water loss in dry soils without damaging the root 17 unlike other, nonvelamentous, taxa (Zotz and Winkler, 2013; Zotz et al., 2017). Indeed, Zotz 18 et al. (2017) found that terrestrial species were most prominent in seasonally dry habitats, 19 which is consistent with our hypothesis of re-terrestrialization events in seasonally dry 20 environments. In addition, Zotz et al. (2017) suggested that velamen predated epiphytism, and 21 thus could have been another key innovation (in addition to stem succulence as shown in this 22 study) for the evolution of epiphytism, a view also supported by our results. As well, this is 23 consistent with the hypothesis that epiphytism appeared in mostly seasonally dry climates.

24

Finally, considering that secondary terrestrials mostly retained their ancestral velamen and 1 succulence traits, we could wonder why some of these taxa are no longer found as epiphytes. 2 3 The minute orchid seeds should not have constrained dispersal between ground and aerial environments, although different communities of suitable mycorrhizal fungi should (Martos et 4 5 al., 2012). Indeed, given that orchids germinate with mycorrhizal fungi, we hypothesise that these taxa could no longer colonise the epiphytic habitat because of an evolutionary change in 6 7 their association with mycorrhizal fungal symbionts, which are different between the ground 8 and the trees (Martos et al., 2012). Mycorrhizal shifts are also suggested by the fact that all 9 terrestrial lineages derived from epiphytic ancestors have evolved strategies of 10 mycoheterotrophy by parasitizing soil-dwelling, ectomycorrhizal or saprotrophic fungi. 11 Mycoheterotrophy is also often seen as an adaptation to shaded forest understorey (Martos et 12 al., 2009). Likewise, even though light conditions of epiphytes span the entire gradient from 13 deep shade to full radiation, many epiphytes may not tolerate shade, and low light in the understorey could thus promote epiphytism (Gravendeel et al., 2004; Zotz, 2013). Therefore, 14 15 because most of Epidendroideae taxa evolved epiphytism, and primary and secondary 16 terrestrial taxa have often evolved mycoheterotrophy, access to light may have been a major 17 constraint in the evolution of Epidendroideae, leading to the evolution of either epiphytism or 18 mycoheterotrophy.

19

### 20 Assumptions and intrinsic limitations of methods

21

We identified two main methodological limitations intrinsic to the methods we used. First,
even though our phylogeny is robust and congruent with previous studies based on a higher
number of plastid markers, the divergence times were based on only three fossils (including a

fossil with an uncertain phylogenetic position), while the Epidendroideae are very much 1 diversified with no less than 23,246 species listed (WCSP, 2021). In addition, divergence time 2 3 confidence intervals are large. Because we allowed the model to infer much older values than our fossil calibrations, such large intervals are partly artefacts of the probability distribution 4 5 we used for calibration points combined with the relaxed molecular clock. Nevertheless, new 6 orchid fossils would be beneficial to ascertain the divergence times of the subfamily. 7 Second, models of ancestral state estimation rely on several assumptions. For instance 8 discrete state models assumes that transition rates between states are constant throughout the 9 phylogeny, even though hidden states in corHMM alleviate to some extent this assumption. 10 Moreover, all transitions are likely to be slightly underestimated due to the processing of 11 polymorphic traits as uncertainties and not as polymorphisms by corHMM; in other words, 12 we only estimated transitions between sampled genera, but were not able to measure within-13 genus transitions.

14

#### 15 CONCLUSION

16

17 Our analyses show that drought-related traits probably did not emerge as adaptations to the 18 epiphytic lifestyle. Rather, epiphytes would have appeared among already drought-adapted 19 terrestrial lineages in seasonally-dry forests, possibly driven by light availability. Particularly, 20 the ancestral stem succulence would have favoured the multiple colonization of aerial 21 environments. This character would have evolved once in the form of a homoblastic 22 pseudobulb, later evolving convergently towards heteroblastic pseudobulbs. When lost, stem 23 succulence would have almost always been offset by leaf succulence, indicating that succulent 24 organs could have actually been a key innovation for the emergence of the epiphytic lifestyle.

- 1 Other physiological and morpho-anatomical traits, such as the CAM photosynthesis, should
- 2 be further investigated in combination with diversification analyses, to further comprehend
- 3 the macroevolutionary history of epiphytism in Epidendroideae.
- 4

## **5 ACKNOWLEDGEMENTS**

- 6
- 7 We thank B. Bytebier et T. Stévart for constructive feedback on these results. We also thank
- 8 the Editor and the two anonymous reviewers for their constructive feedbacks.

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### **1 TABLES AND FIGURES**

2

### 3 Table 1

4	Tests of correlated evolution between epidendroid orchid lifestyle (epiphytic/terrestrial) and
5	stem (absence/presence), or leaf succulence (absence/presence) using two methods
6	(BayesTraits and corHMM). The log marginal likelihood (LML) of the dependent or
7	independent models, and the log Bayes factor (BF), were calculated using BayesTraits. We
8	considered a BF > 2 to be significant support for the dependent ( <i>i.e.</i> correlated evolution)
9	model. Symmetric matrices were used in corHMM to correlate or decorrelate the two traits
10	(see Supplementary Data Table S3 for more details on these matrices). A delta AICc between
11	0 and 2 indicates that the AICc values are not significantly different. A delta AICc $> 2$
12	indicates that the correlated model fits the data significantly better.
13	
14	Figure 1

- 15 Illustration of morpho-anatomical water-related traits observed among epiphytic and
- 16 terrestrial epidendroid orchids. (A) Homoblastic pseudobulbs (composed of several
- 17 internodes) of the terrestrial Oeceoclades pulchra (Thouars) P.J.Cribb & M.A.Clem.
- 18 (Cymbidieae, Eulophiinae). (B) Heteroblastic pseudobulbs of the epiphytic Bulbophyllum
- 19 nutans (Lindl.) Rchb.f. species complex (Malaxideae, Dendrobiinae). (C) Succulent leaves of
- 20 the epiphytic Holcoglossum pumilum (Hayata) L.J.Chen, X.J.Xiao & G.Q.Zhang (Vandeae,
- 21 Aeridinae). Photograph by sunoochi from Sapporo, Hokkaido, Japan, CC BY 2.0,
- 22 https://commons.wikimedia.org/w/index.php?curid=83337314. (D) Multi-layered velamen,
- 23 cross-section of a root of *O. pulchra*.
- 24

Evolution of lifestyle and succulent stems and leaves in epidendroid orchids. (A) and (B) 2 3 Ancestral state estimation of lifestyles in the Epidendroideae genus tree with corHMM. Pie charts at nodes represent ancestral lifestyles and their probabilities under correlated evolution 4 5 with leaf succulence. For succulent stems and leaves, only significant state changes, *i.e.* state 6 probability > 0.5 while < 0.5 in the ancestral node, were indicated by coloured triangles (see 7 Supplementary Data Figs. S4A and S5 for full ancestral state estimations of stem and leaf 8 succulence respectively). The character states of the present genera are represented on the 9 right side of the tree by coloured boxes. In addition, genera with mycoheterotrophic species 10 are indicated by a mushroom symbol. Non-monophyletic subtribes are indicated by stars after 11 the subtribe name. (C) Diagram of transition rates (in events/Myr) between lifestyles and 12 presence/absence of succulent stems or (D) leaves estimated under correlated evolution in 13 corHMM with a symmetric and an all-rate-different transition matrices, respectively.

14

15

#### 16 Figure 3

17 Estimation of ancestral geographic ranges in relation to the evolution of epiphytism. 18 Ancestral ranges were estimated in the dated phylogenetic tree of the 203 genera of 19 epidendroid orchids using the BayAreaLike\*+J model in BioGeoBEARS. The different 20 geographical areas occupied by the present-day Epidendroideae genera are represented by 21 unique colours. The pie charts at nodes represent the ancestral geographic ranges in 22 proportion to their likelihood. These are solid-coloured when the range comprises a single 23 area (e.g. Neotropics), or striped when the range comprises several geographical areas (e.g., a 24 range represented by orange and light blue bands includes both Southeast Asia and Australia).

- 1 The geographical ranges of extant genera are represented on the right-hand side of the tree by
- 2 coloured boxes. Significant lifestyle changes, *i.e.* state probability > 0.5 while < 0.5 in the
- 3 ancestral node, were indicated by coloured triangles (see Fig. 2 for full ancestral state
- 4 estimation of lifestyles).

## **Table 1**

## 

	BayesTraits			corHMM		
Tested	LML of	LML of	log BF	AICc	AICc	delta
correlation	independent	dependent		correlated	uncorrelated	AICc
	model	model		matrix	matrix	
Lifestyle~Stem	-147.4	-144.0	6.7	276.9	278.8	1.9
succulence						
Lifestyle~Leaf	-183.1	-172.8	20.7	324.4	344.5	20.2
succulence						





