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RESEARCH

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Holistic approach for plant species circumscription integrating standard barcodes, chloroplast genomes, single-copy nuclear genes and micro-morphological data: a case study in *Epimedium* (Berberidaceae)

Ya-jing Fan^{1,2}, Cheng-guo Li^{1,2}, Chao Ma^{1,2}, Min He^{1,2}, Jun-peng Ma^{1,2}, Min-rong Luo³, Richard G.J. Hodel⁴, Florian Jabbour⁵, Liang Zhao^{1,2*} and Qian Yang^{1,2*}

Abstract

Background Accurate plant species circumscription is fundamental to biodiversity conservation, medicinal resource development, and ecological research. Yet challenges such as sample incompleteness and reliance on limited molecular markers often hinder precise species circumscription. A single identification method—molecular or morphological—is in most cases not sufficient to accurately recognize plant species. Notably, single-copy nuclear genes, despite their critical importance in resolving species circumscription through higher evolutionary rates and biparental inheritance, remain underexplored in current research. A critical next step is developing nuclear genes as DNA barcodes. In some cases, micro-morphological characteristics mirror molecular evidence and confirm species identification. *Epimedium* (Berberidaceae), well known for its medical and horticultural significance, remains poorly understood taxonomically due to its phenotypic diversity. It is an ideal taxon to explore integrative plant species circumscription combining molecular and micro-morphological data.

Results Chloroplast genome structure analysis revealed that the variations near the IR/SC boundary, the unique *trnQ-UUG* gene rearrangement, and the repeat sequences in *Epimedium* hold significant evolutionary implications. It not only uncovered the conservation and specificity of genomic structures but also provided novel insights into the phylogeny and molecular evolution of this genus. We identified eight hypervariable regions in *Epimedium* species that emerged as strong candidates for potential DNA special barcodes. These regions and the whole chloroplast genome showed higher species discriminability compared to standard barcodes. Single-copy nuclear genes were more useful in species circumscription over chloroplast genomes. Furthermore, micro-morphological characteristics served as

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strong complementary evidence for species circumscription and could help distinguish species that were unresolved using only molecular or genomic analyses.

Conclusions Using *Epimedium* as a case study, we propose a Multilayer Precision Species Circumscription Approach (MPSCA), a diagnostic framework that combines standard barcodes, chloroplast genome, single-copy nuclear genes, and micro-morphological data.

Keywords Berberidaceae, Circumscription, DNA barcodes, *Epimedium*, Single copy nuclear gene

Background

Accurate species circumscription is the cornerstone of biodiversity conservation, medicinal resource development, and ecological research [1, 2]. However, in practical applications, many challenges associated with species circumscription surpass the capabilities of traditional morphological methods (e.g. *Citrus* [3]; *Begonia* [4]; *Corydalis* [5]; *Rhododendron* [6]). For instance, in cases involving the prevention of important plant resource theft, detection of medicinal plant adulteration, or differentiation of agricultural crop varieties, reliance solely on morphological traits often hinders the accurate identification of closely related species or the analysis of highly similar specimens [7, 8]. These limitations are further exacerbated when dealing with processed plant materials, such as crushed powders, dried strips, or other treated forms, where morphological features are often obscured or entirely lost, rendering traditional identification methods ineffective [9]. Such shortcomings not only hinder the protection and sustainable management of plant resources but also jeopardize the quality control of medicinal products and the regulation of their markets [10]. Thus, the development of robust and integrative species circumscription methods remains a task that needs to be continuously explored and improved.

In response to these challenges, molecular markers have been a reliable workhorse in species circumscription, offering higher resolution and objectivity [10–13]. Early efforts in molecular systematics relied on gene segments, such as the chloroplast DNA (cpDNA) markers *rbcL*, *matK*, *trnH-psbA*, and nuclear ITS, which were widely adopted for their utility in plant species identification [14–18]. These markers, nevertheless, often lacked sufficient resolution for closely related taxa due to their limited variability [19–21]. With the emergence of next-generation sequencing (NGS) technologies, the focus shifted to analyzing entire chloroplast genomes, providing a comprehensive dataset for resolving species boundaries [21–24]. Super barcodes are whole chloroplast or mitochondrial genomes used as barcodes, offering higher resolution and greater information content compared to traditional short-fragment barcodes. However, generating fully annotated super barcodes is costly and their assembly remains challenging [23]. Consequently, gene fragments screened from the entire chloroplast genome

are used as special barcodes because they provide rich phylogenetic information and can offer species-level discrimination. However, the uniparental inheritance and slow evolution of chloroplast genomes restrict their utility [25, 26].

Nuclear genes are increasingly utilized in plant circumscription [27–29]. Their biparental inheritance and recombination make nuclear genes more appropriate than organellar genes when dealing with hybridization, polyploidization, rapid speciation, incomplete lineage sorting, and horizontal gene transfer among closely related species [30, 31].

Initially, only a handful of nuclear genes were successfully used to provide phylogenetic hypotheses (*C-mos* [32]; *LFY* [33]; *ALG11* [34]). Nuclear markers can now be obtained more easily via transcriptome sequencing (RNA-seq) and restriction site associated DNA sequencing (RAD-seq) [35–37]. Nevertheless, these two methods have limitations due to the need for fresh tissue, and uncertainty in orthology inference [38, 39]. Target enrichment sequencing (Hyb-seq) emerged as a promising alternative for plant species circumscription, yet its high cost for customized probes and complex experimental procedures remain significant drawbacks [40, 41].

Deep genome skimming (DGS) technology, as an alternative to Hyb-Seq, stands out for its ability to efficiently and economically recover hundreds of single-copy nuclear genes (SCNs), along with chloroplast, mitochondrial DNA (mtDNA), and entire nuclear ribosomal DNA (nrDNA) repeat sequences, from deep genome sequencing data [42, 43]. Notably, DGS overcomes material restrictions, as it does not require fresh tissue, and provides a cost-effective approach to obtaining a wealth of nuclear gene data [42, 43]. Therefore, with the decreasing cost of sequencing, the DNA barcoding concept is now poised to extend its reach into SCNs data, enabling us to address previously intractable species circumscription [44–46].

Traditional morphological methods have long played an important role in species circumscription [47–49]. With the rapid development of molecular systematics, morphological characteristics remain critical, often to corroborate with molecular evidence for enhanced species circumscription in the molecular era [50–52].

The genus *Epimedium* (Berberidaceae), commonly known as “horny goat weed”, is a group of perennial herbs comprising approximately 60 to 70 species, most of which are endemic to China, with a few species occurring in Asia or Europe [53–57]. China serves as the center of its diversity, hosting ~80% of the genus’s species, many of which are narrowly distributed in mountainous regions such as the Hengduan Mountains, Qinling Mountains, and karst landscapes of southwestern China [57, 58]. The selected species for this study include both widespread taxa (e.g., *E. brevicornu* and *E. sagittatum*) and regionally restricted endemics (e.g., *E. hunanense* and *E. qingchengshanense*), reflecting the genus’s biogeographic and ecological heterogeneity [57].

The morphological classification of *Epimedium* species presents significant challenges, primarily due to overlapping traits such as leaflet shape, flower spur length, and sepal pigmentation [56]. For instance, although *E. acuminatum* and *E. koreanum* exhibit distinct typical leaflet morphology, spur length, and sepal coloration, they prove difficult to precisely distinguish due to continuous variation of these traits in natural populations [57]. These ambiguities are further exacerbated in processed medicinal materials, where diagnostic traits are often lost. Traditional classification criteria based on floral structures are insufficient to accurately distinguish species,

especially those with overlapping morphological characteristics [59].

However, leaf epidermal characteristics, such as stomatal morphology and wax patterns, offer a promising alternative [60]. These traits are environmentally stable, accessible year-round, and preserved in herbarium specimens, even when floral structures are absent or degraded. Previous studies on *Epimedium* micro-morphology have primarily focused on floral structures, such as petal epidermal cell types and nectary anatomy [59]. Systematic investigations of leaf epidermal traits for species circumscription remain largely unexplored, highlighting a critical gap in resolving taxonomic ambiguities within this genus.

In traditional Chinese medicine, *Epimedium* leaves are prized for their bioactive compounds, yet adulteration is widespread due to morphological convergence. For example, *E. brevicornu* and *E. koreanum*—pharmacologically distinct species—are frequently confused in commercial markets [55]. Similarly, *E. wushanense* is often substituted with the morphologically similar but chemically divergent *E. pseudowushanense* [61]. Such misidentification not only undermines product efficacy but also threatens sustainable resource management.

Additionally, this genus also holds significant value in horticulture (Fig. 1) [54, 63]. The genus *Epimedium* was first described by Linnaeus in 1753 [62]. The 19th century saw an expansion in descriptions of *Epimedium* species, particularly from East Asia, though infrageneric classifications remained inconsistent due to overlapping morphological characters [63–65]. A Major milestone was achieved in the 20th century with Stearn’s comprehensive revision, which provided a systematic framework and described numerous new species [56]. The integration of molecular phylogenetic methods in recent decades has further clarified relationships within the genus, resolving long-standing taxonomic ambiguities. Despite these advances, species circumscription in *Epimedium* remains challenging due to high morphological plasticity and frequent hybridization [63–69].

Here, we generate plastome sequences and single copy nuclear genes to combine with micro-morphological data in the Berberidaceae for species delimitation in this rapidly radiating group. Specifically, we address the following objectives: (1) assess the utility of complete plastomes as super barcodes; (2) assess the utility of SCNs as potential barcode candidates; (3) integrate leaf micro-morphological characteristics as diagnostic tools in *Epimedium* taxonomy, complementing molecular approaches to enhance species circumscription accuracy. We propose and validate a novel, integrated framework for plant species circumscription that combines standard barcodes, chloroplast genome, SCNs, and micro-morphological data, using *Epimedium* as an example. This method will

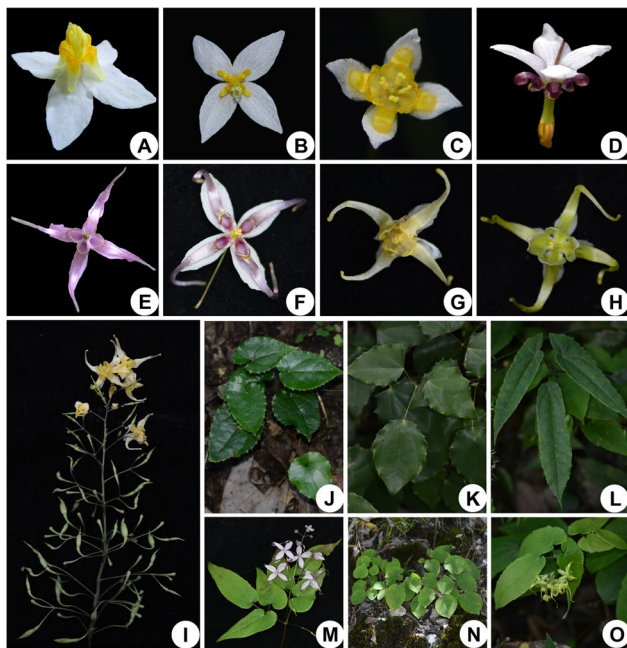


Fig. 1 Morphological diversity of *Epimedium* species. **A–H** Flowers of different forms. **AE.** *brevicornu*. **BE.** *pubescens*. **CE.** *truncatum*. **DE.** *dolichostemon*. **EE.** *sutchuenense*. **FE.** *acuminatum*. **GE.** *chlorandrum*. **HE.** *franchetii*. **I** Panicle of *E. chlorandrum*. **J–L** Pinnately compound leaves *E. leptorrhizum*, *E. truncatum*, and *E. mikinorii*. **M, O** Racemes of *E. acuminatum* and *E. hunanense*. **NE.** *pubescens*

provide a generalizable technical framework for the rapid circumscription of other plant taxa, and promote the further development of plant taxonomy and biodiversity research. Additionally, while our primary focus is species circumscription, we concurrently analyze chloroplast genome structural features to explore their potential roles in elucidating genomic diversity and evolutionary dynamics within *Epimedium*.

Results

Characteristics of *Epimedium* plastomes

The 27 complete chloroplast genomes of *Epimedium* all showed a typical quadripartite structure consisting of a

large single-copy region (LSC, 86882–89455 bp), a small single-copy region (SSC, 16,031 bp–17,224 bp), and two inverted-repeat regions (IR, 25,209 bp–26,236 bp), with the total length ranging from 156,720 bp (*E. leptorrhizum* ZY707) to 159,159 bp (*E. pauciflorum* ZY709) (Fig. 2; Table 1). The total Guanine-Cytosine (GC) content of each sequence varied from 38.7 to 38.9, with the highest content in the IR region, followed by the LSC and SSC regions (Table 1). The total number of unique genes annotated in Most of the sequences was 112, including 78 protein-coding genes, 4 ribosomal RNA genes and 30 transporter RNA genes (Table S1). For all species of this genus, there were 20 repeats genes in the IR region,

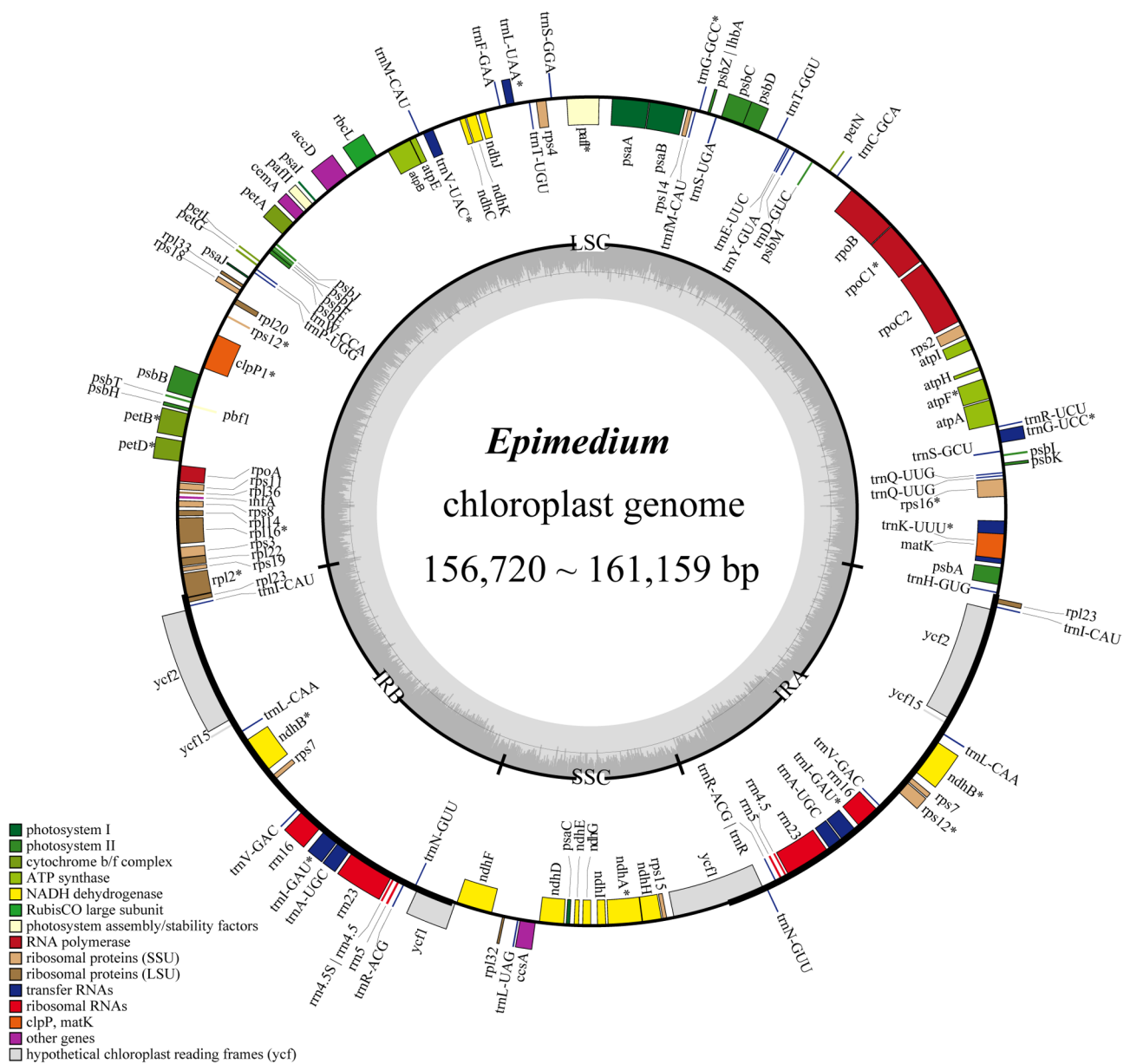


Fig. 2 Gene map of *Epimedium* chloroplast genome. The two gray arrows indicate the direction of gene transcription. The dashed area in the inner circle indicates the GC content of the plastome. LSC: large-single-copy; SSC: small-single-copy; IR: inverted repeat

Table 1 Genomic characteristics and source statistics of *Epimedium* and outgroups

| Species | Voucher number | GenBank accession | SRA accession | Total size (bp) | Total GC% | LSC | | SSC | | IR | |
|------------------------------|----------------|-------------------------------------|---------------|-----------------|-----------|-----------|------|-----------|------|-----------|------|
| | | | | | | size (bp) | GC% | size (bp) | GC% | size (bp) | GC% |
| <i>E. acuminatum</i> | 701 | PV192894 OQ366391* | SRR31870119 | 156,711 | 38.8 | 89,043 | 37.4 | 17,022 | 32.8 | 25,323 | 43.3 |
| <i>E. borealiguizhouense</i> | 702 | PV192895 MN873561* NC044889* | SRR31870118 | 156,697 | 38.8 | 89,030 | 37.4 | 17,033 | 32.8 | 25,317 | 43.3 |
| <i>E. brachyrrhizum</i> | 715 | PV192904 | SRR31870113 | 156,570 | 38.8 | 88,921 | 37.4 | 17,105 | 32.8 | 25,272 | 43.3 |
| <i>E. brevicornu</i> | 716 | PV192900 | SRR31870112 | 154,550 | 38.8 | 86,882 | 37.3 | 17,072 | 32.7 | 25,298 | 43.3 |
| | 717 | PV192901 | SRR31870111 | 156,647 | 38.8 | 88,979 | 37.4 | 17,072 | 32.7 | 25,298 | 43.3 |
| | 731 | PV192902 MT560406* MN714008* | SRR31870099 | 156,637 | 38.8 | 88,993 | 37.4 | 17,056 | 32.7 | 25,292 | 43.3 |
| <i>E. coactum</i> | 713 | PV192907 | SRR31870115 | 156,385 | 38.8 | 88,849 | 37.4 | 17,086 | 32.8 | 25,275 | 43.3 |
| | | MT560395* | | | | | | | | | |
| | | MT560402* | | | | | | | | | |
| <i>E. davidii</i> | 703 | PV192910 | SRR31870107 | 156,022 | 38.8 | 88,499 | 37.4 | 17,069 | 32.8 | 25,227 | 43.3 |
| | | MT560419* | | | | | | | | | |
| <i>E. elongatum</i> | 733 | PV192915 | SRR31870097 | 156,439 | 38.8 | 88,911 | 37.4 | 17,068 | 32.8 | 25,230 | 43.3 |
| | | NC080247* | | | | | | | | | |
| <i>E. flavum</i> | 704 | PV192918 MW483093* | SRR31870096 | 155,961 | 38.9 | 89,007 | 37.4 | 16,506 | 33.0 | 25,224 | 43.3 |
| <i>E. franchetii</i> | 705 | PV192906 NC065479* | SRR31870095 | 156,367 | 38.8 | 88,783 | 37.4 | 17,042 | 32.8 | 25,271 | 43.3 |
| <i>E. glandulosopilosum</i> | 706 | PV192916 | SRR31870094 | 156,447 | 38.8 | 88,927 | 37.4 | 17,072 | 32.7 | 25,224 | 43.3 |
| | | MT560393* | | | | | | | | | |
| <i>E. koreanum</i> | 718 | PV192919 | SRR31870110 | 157,115 | 38.7 | 89,455 | 37.3 | 17,224 | 32.8 | 25,218 | 43.3 |
| | 719 | PV192920 | SRR31870109 | 156,528 | 38.8 | 89,022 | 37.4 | 17,184 | 32.8 | 25,161 | 43.3 |
| | | MT560411* KM207675* | | | | | | | | | |
| <i>E. leptorrhizum</i> | 707 | PV192909 | SRR31870093 | 156,135 | 38.9 | 88,824 | 37.4 | 16,761 | 33.0 | 25,275 | 43.3 |
| | | NC062453* | | | | | | | | | |
| <i>E. mikinorii</i> | 708 | PV192896 | SRR31870092 | 156,492 | 38.8 | 88,937 | 37.4 | 16,921 | 32.8 | 25,317 | 43.3 |
| | | NC044890* | | | | | | | | | |
| <i>E. pauciflorum</i> | 709 | PV192912 | SRR31870091 | 156,585 | 38.8 | 89,045 | 37.4 | 17,092 | 32.7 | 25,224 | 43.3 |
| | | NC044890* | | | | | | | | | |
| <i>E. platypetalum</i> | 710 | PV192917 | SRR31870090 | 156,523 | 38.8 | 88,983 | 37.4 | 17,068 | 32.8 | 25,236 | 43.3 |
| | | MW483078* | | | | | | | | | |
| <i>E. pubescens</i> | 720 | PV192903 | SRR31870108 | 156,411 | 38.8 | 88,940 | 37.4 | 16,911 | 32.7 | 25,280 | 43.3 |
| | 721 | PV192913 | SRR31870106 | 156,550 | 38.8 | 88,980 | 37.4 | 17,026 | 32.8 | 25,272 | 43.3 |
| | | MT560420* NC053532* MN939633* | | | | | | | | | |
| <i>E. qingchengshanense</i> | 714 | PV192911 | SRR31870114 | 156,514 | 38.8 | 89,034 | 37.4 | 17,062 | 32.8 | 25,209 | 43.3 |
| | | NC053539* | | | | | | | | | |
| | | MT560415* | | | | | | | | | |
| <i>E. sagittatum</i> | 722 | PV192905 | SRR31870105 | 157,502 | 38.8 | 88,999 | 37.4 | 16,031 | 32.7 | 26,236 | 43.0 |
| | 723 | PV192908 | SRR31870104 | 156,510 | 38.8 | 88,898 | 37.4 | 17,081 | 32.8 | 25,266 | 43.3 |
| | | MN02726* | | | | | | | | | |
| <i>E. simplicifolium</i> | 711 | PV192897 NC053529* | SRR31870117 | 156,749 | 38.8 | 89,020 | 37.4 | 17,037 | 32.8 | 25,346 | 43.3 |
| <i>E. stellulatum</i> | 712 | PV192898 | SRR25207830* | 156,697 | 38.8 | 89,048 | 37.4 | 17,031 | 32.8 | 25,309 | 43.3 |
| | | MN027267* | | | | | | | | | |
| <i>E. wushanense</i> | 724 | PV192914 | SRR31870103 | 156,418 | 38.8 | 88,968 | 37.4 | 17,002 | 32.9 | 25,224 | 43.3 |

Table 1 (continued)

| Species | Voucher number | GenBank accession | SRA accession | Total size (bp) | Total GC% | LSC | | SSC | | IR | |
|--------------------|----------------|-----------------------|---------------|-----------------|-----------|-----------|------|-----------|------|-----------|------|
| | | | | | | size (bp) | GC% | size (bp) | GC% | size (bp) | GC% |
| | 732 | PV192899 MN857417* | SRR31870098 | 156,483 | 38.8 | 88,831 | 37.4 | 17,052 | 32.8 | 25,300 | 43.3 |
| <i>P. dubium</i> | 729 | PV192922 | SRR31870101 | | | | | | | | |
| <i>P. peltatum</i> | 730 | PV192923 | SRR31870100 | | | | | | | | |
| <i>V. hexandra</i> | 728 | PV192921 | SRR31870102 | | | | | | | | |

* indicates sequences downloaded from National Center of Biotechnology Information. Newly sequenced data are listed without additional symbols. Full provenance details, including collection sites and voucher specimens, are provided in Supplementary Table S8

including 9 protein-coding genes, and 4 rRNA genes and 7 tRNA genes. *trnQ-UUG* gene was repeated in the LSC region. Thus, most of the *Epimedium* genomes have 133 genes. Due to the absence of the *rpl32* gene, the total number of unique genes annotated in *E. flavum* ZY704 was 111. A total of 17 genes contained unique introns, of which 15 contained one intron and two contained two introns.

Comparative genome analyses

Using *Epimedium acuminatum* ZY701 as the reference sequence, 21 sequences from different species were selected to visualize alignments. The results showed that the chloroplast genomes of different species in *Epimedium* were highly similar, but some species had gene insertions and deletions in some regions. Meanwhile, compared with the coding regions of CDS genes, the non-coding regions displayed more dissimilarity (Fig. S1). The whole chloroplast genome of *E. acuminatum* ZY701 was compared with that of other genera of Berberidaceae. The results indicated significant differences in sequence length, gene order, and content between *Epimedium* and its related genera (Fig. S2).

The Berberidoideae significantly exhibited amplification of the IR region with an increase of approximately 10,000 bp, which was not observed in the other subfamilies. In the Nandinoideae, the LSC-IRa boundary involved the gene *rps19*, while the IRb-SSC region boundary was located between the gene *rps19* and the gene *trnH-GUG*. However, the length of the IR region and the gene composition of its boundaries in the genus *Epimedium* differed significantly from those of the Berberidoideae and the Nandinoideae (Fig. 3, S3).

In *Epimedium*, we found that seven genes (*rpl2*, *rpl22*, *rpl23*, *ycf1*, *rpl19*, *trnI*, *trnH*) were located near these boundary regions (Fig. 3). Notably, the IR region of this genus exhibits significant length variation, with differences ranging up to approximately 1000 bp, and we found obvious contraction and expansion phenomena. Specifically, the LSC-IRa boundary of 12 species is positioned within *rpl2*, while seven species exhibited this boundary within *rpl22*, and in two species it was located in *rpl23*. IR-SSC boundaries were located within *ycf1*. The

LSC-IRb boundaries were located between *rpl23* and *trnH* for 13 species, between *rpl19* and *trnH* for six species, and between *rpl2* and *trnH* for two other species. Therefore, the IR region of seven species, including *E. davidii*, *E. elongatum*, *E. flavum*, *E. pauciflorum*, *E. platy-petalum*, *E. qingchengshanense*, and *E. wushanense*, show a significant expansion. On the contrary, *E. koreanum* and *E. leptorrhizum* showed significant IR contraction (Fig. 3).

The comparative analysis revealed significant variations in SSR counts among species, with *E. simplicifolium* and *E. mikinorii* exhibiting the lowest counts at 80, and *E. franchetii* the highest at 94 (Fig. 4A). Mononucleotides were the Most abundant SSR type, accounting for 78.9%, followed by dinucleotides, tetranucleotides, and trinucleotides. Pentanucleotides and hexanucleotides were less frequent, constituting 0.9% and 0.2%, respectively (Fig. 4A). Microsatellites (SSRs) with lengths between 10 bp and 13 bp Made up approximately 85% of the total, primarily located in the LSC region (85%), with the SSC region containing 12%, and the IR region the least at 3% (Fig. 4B and C).

In the analysis of 21 chloroplast genomes, a total of 706 tandem repeats were identified, with counts ranging from 30 (*E. coactum*) to 36 (*E. flavum*, *E. pauciflorum*, *E. simplicifolium*) across species (Fig. 4D). These tandem repeats were predominantly found in the IR region (64%), followed by the LSC region (32%), while only 1–2 were observed in the SSC region (Fig. 4D). Concerning large repeats, a total of 1964 were detected across the 21 chloroplast genomes, comprising 1021 forward repeats, 932 palindromic repeats, 5 complement repeats, and 6 reverse repeats (Fig. 4D). The distribution of these repeats varied among species, with forward and palindromic repeats displaying a range of counts, while complementary and reverse repeats were nearly absent. Most large repeats were 30–39 bp in length (57.4%), with longer repeats becoming less frequent. These large repeats were predominantly located in the LSC and IR regions, with very few observed in the SSC region (Fig. 4E).

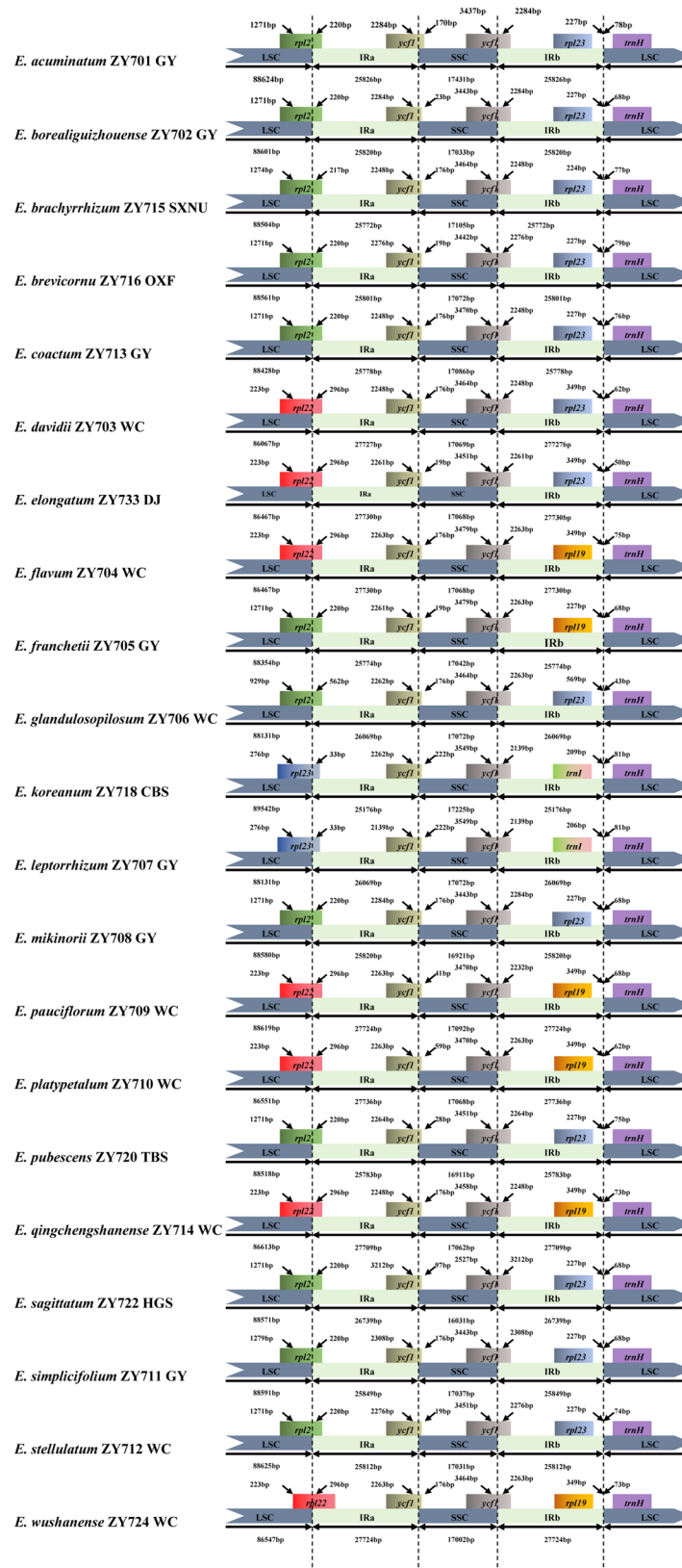


Fig. 3 Comparison of the LSC, IR and SSC boundary regions of the plastomes of 21 species of *Epimedium*

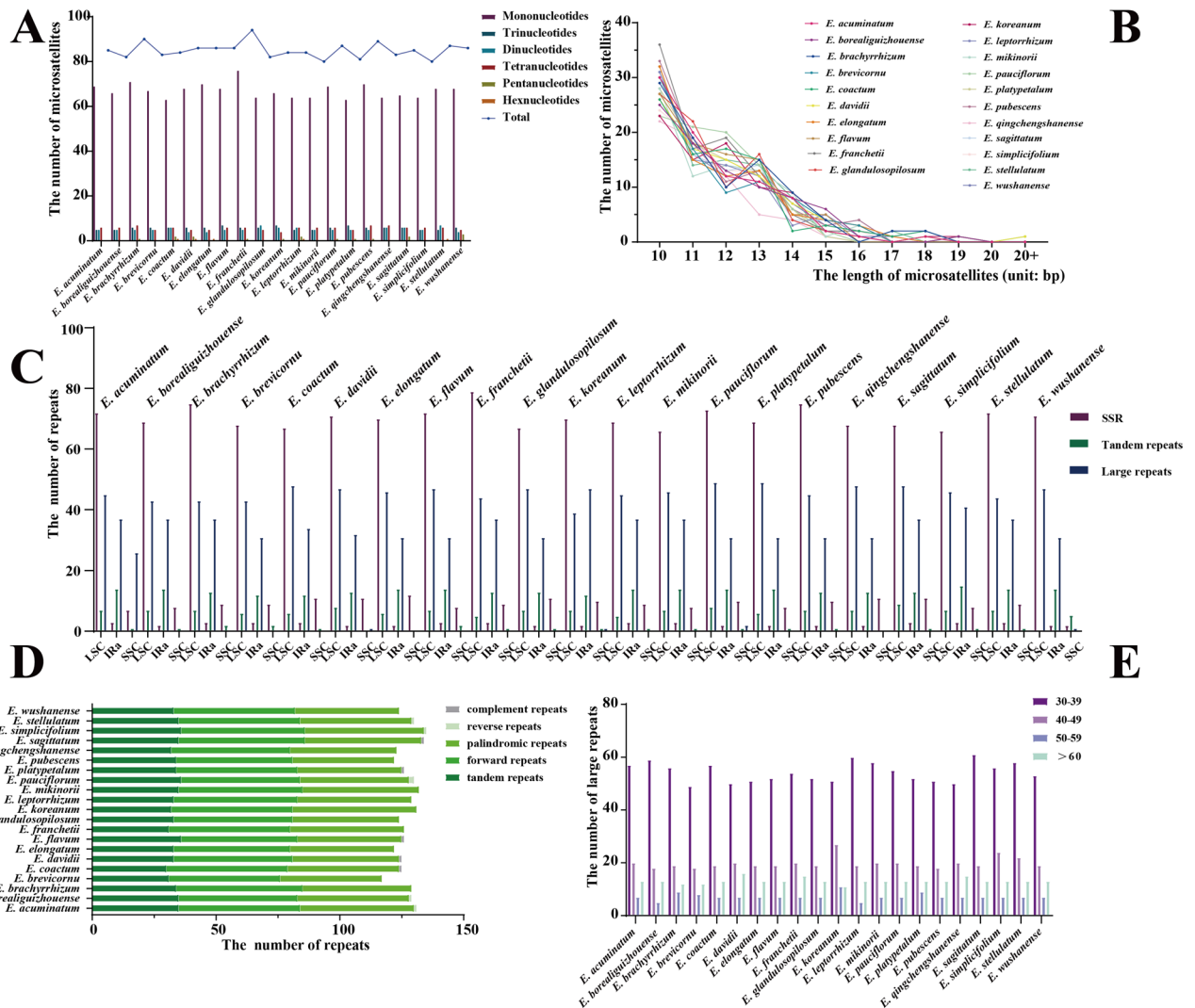


Fig. 4 Analyses of SSRs and repeated sequences in the plastomes of 21 species of *Epimedium*. **A** Frequency of microsatellites by the length of repeated units. **B** Frequency of microsatellites by length (unit: bp). **C** Frequency of all repeats by location. **D** Numbers of five different types of repeats. **E** Frequency of four types of dispersed repeats by length (unit: bp)

Hypervariable regions in the chloroplast genomes

The analysis revealed Pi values ranging from 0 to 0.08940, with an average of 0.00194 (Fig. 5). We identified eight regions where Pi values exceeded the 0.008 threshold, with the *ycf1-ndhF* region exhibiting the highest diversity at 0.04223. Notably, these high-Pi-value sites were situated in the spacer regions. Specifically, we identified eight regions of high variability with Pi values ranging from 0.00239 to 0.08940. These regions include *psbA-trnH*, *psbC-psbZ*, *psaA-pafI*, *accD-pafII*, *ycf1-ndhF*, *rpl32-trnL*, *ndhD-psaC*, and *rps15-ycf1* (Table 2). The distribution of these highly variable regions exhibits distinct characteristics: four (*psbA-trnH*, *psbC-psbZ*, *psaA-pafI*, *accD-pafII*) are clustered in the large single-copy region (LSC), while the other four (*ycf1-ndhF*, *rpl32-trnL*, *ndhD-psaC*, *rps15-ycf1*) are located in the small single-copy region

(SSC). No regions of high variability were found within the inverted repeat region (IR).

Standard barcodes and chloroplast genomes in species discrimination

The variable site proportions and total site were 304/1578 (19.3%) for *matK*, 114/1428 (8.0%) for *rbcL*, 2/674 (0.3%) for *trnH-psbA*, 649/7483 (8.7%) for the tandem hypervariable region and 39,140/179,620 (24.8%) for the whole chloroplast genome (Table 3). Using the maximum likelihood (ML) method, the *rbcL* gene exhibited the lowest identification efficiency (9.5%), successfully distinguishing only *Epimedium acuminatum* and *E. koreanum* (Fig. S4A). The *matK* gene showed higher efficiency (14.3%), identifying *E. borealiguizhouense*, *E. flavum*, and *E. koreanum* (Fig. S5A). The *trnH-psbA* spacer achieved the highest single-locus efficiency (19.0%),

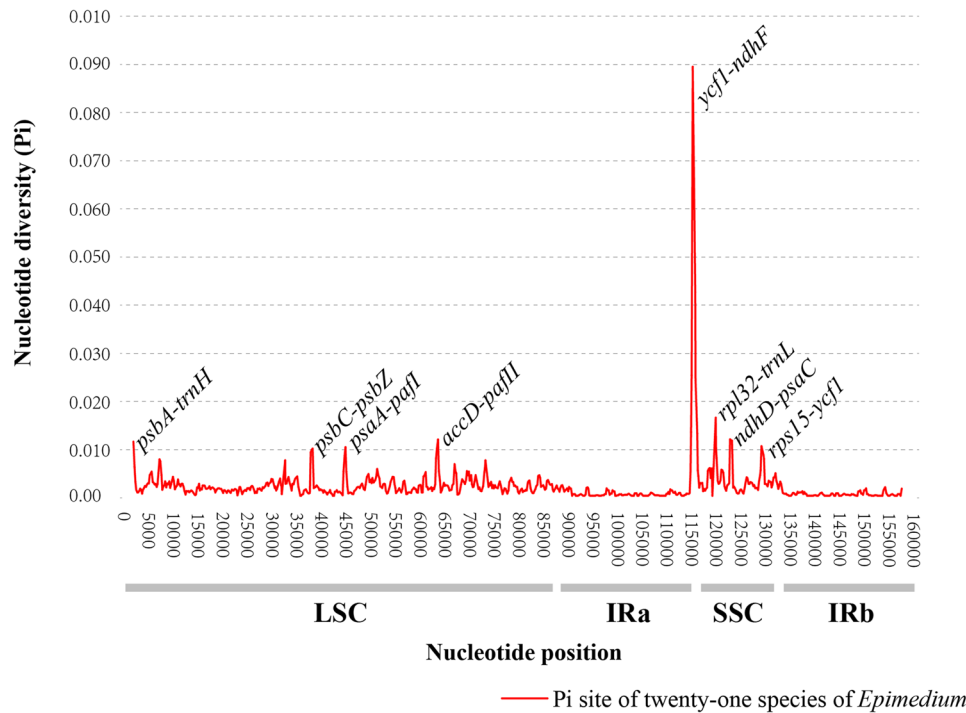


Fig. 5 Sliding window analysis of the 27 plastomes of samples of *Epimedium*. The horizontal axis indicates the location of the nucleotide, and the vertical axis indicates the Pi value

Table 2 Sequence characterization of eight hypervariable regions in 27 chloroplast genomes of *Epimedium*

| Region | Aligned length | Variable sites | | Indels | | Nucleotide diversity (Pi) |
|-------------------|----------------|----------------|------|--------|----------------|---------------------------|
| | | No. | % | No. | Average length | |
| <i>trnH-psbA</i> | 600 | 32 | 5.33 | 18 | 5.600 | 0.01131 |
| <i>psbC-psbZ</i> | 953 | 21 | 2.20 | 7 | 5.571 | 0.00950 |
| <i>psaA-pafI</i> | 789 | 36 | 4.56 | 8 | 4.250 | 0.00788 |
| <i>accD-pafI</i> | 1210 | 43 | 3.56 | 15 | 4.800 | 0.00795 |
| <i>ycf1-ndhF</i> | 1010 | 35 | 3.47 | 8 | 120.000 | 0.04224 |
| <i>rpl32-trnL</i> | 987 | 21 | 2.13 | 8 | 5.750 | 0.01137 |
| <i>ndhD-psaC</i> | 1001 | 32 | 3.20 | 6 | 3.500 | 0.01161 |
| <i>rps15-ycf1</i> | 466 | 22 | 4.72 | 8 | 31.750 | 0.00810 |

Table 3 Sequence characterization of chloroplast genetic markers in 27 Chloroplast genomes of *Epimedium*

| Marker | Length | Variable sites | Pairwise Identity% | Identical sites% | GC% |
|-----------------------|---------|----------------|--------------------|------------------|------|
| <i>matK</i> | 1578 | 304 | 98.7 | 76.9 | 33.9 |
| <i>rbcl</i> | 1428 | 114 | 99.5 | 92.0 | 44.4 |
| <i>trnH-psbA</i> | 674 | 2 | 92.0 | 16.2 | 28.4 |
| hypervariable regions | 8483 | 649 | 91.8 | 30.0 | 32.9 |
| chloroplast genome | 179,620 | 19,605 | 97.5 | 66.0 | 38.8 |

discriminating *E. borealiguizhouense*, *E. flavum*, *E. koreanum*, and *E. qingchengshanense* (Fig. S5C). The concatenated *matK*+*rbcl*+*trnH-psbA* dataset identified the same four species as the *trnH-psbA* spacer (Fig. S5C). The tandem hypervariable region dataset distinguished six species (28.6%) (Fig. 6A). Similarly, the complete

chloroplast genome Successfully distinguished six of 21 species (28.6%) (Fig. 6C). Under Bayesian inference (BI), both *rbcl* and *matK* demonstrated identical identification efficiency (14.3%): *rbcl* distinguished *E. acuminatum*, *E. flavum*, and *E. koreanum*, while *matK* identified *E. borealiguizhouense*, *E. flavum*, and *E. koreanum* (Fig. S4B, S5B). The *trnH-psbA* spacer again showed the highest efficiency (19.0%), resolving the same four species as under ML (*E. borealiguizhouense*, *E. flavum*, *E. koreanum*, and *E. qingchengshanense*) (Fig. S4D). The concatenated combination replicated this four-species identification outcome (Fig. S5D). The tandem highly variable region dataset again distinguished six species (28.6%), and the whole chloroplast genomes distinguished six species (28.6%) (Fig. 6B, D).

Compared to single-segment barcodes, the combination of two or three loci provided limited improvement in

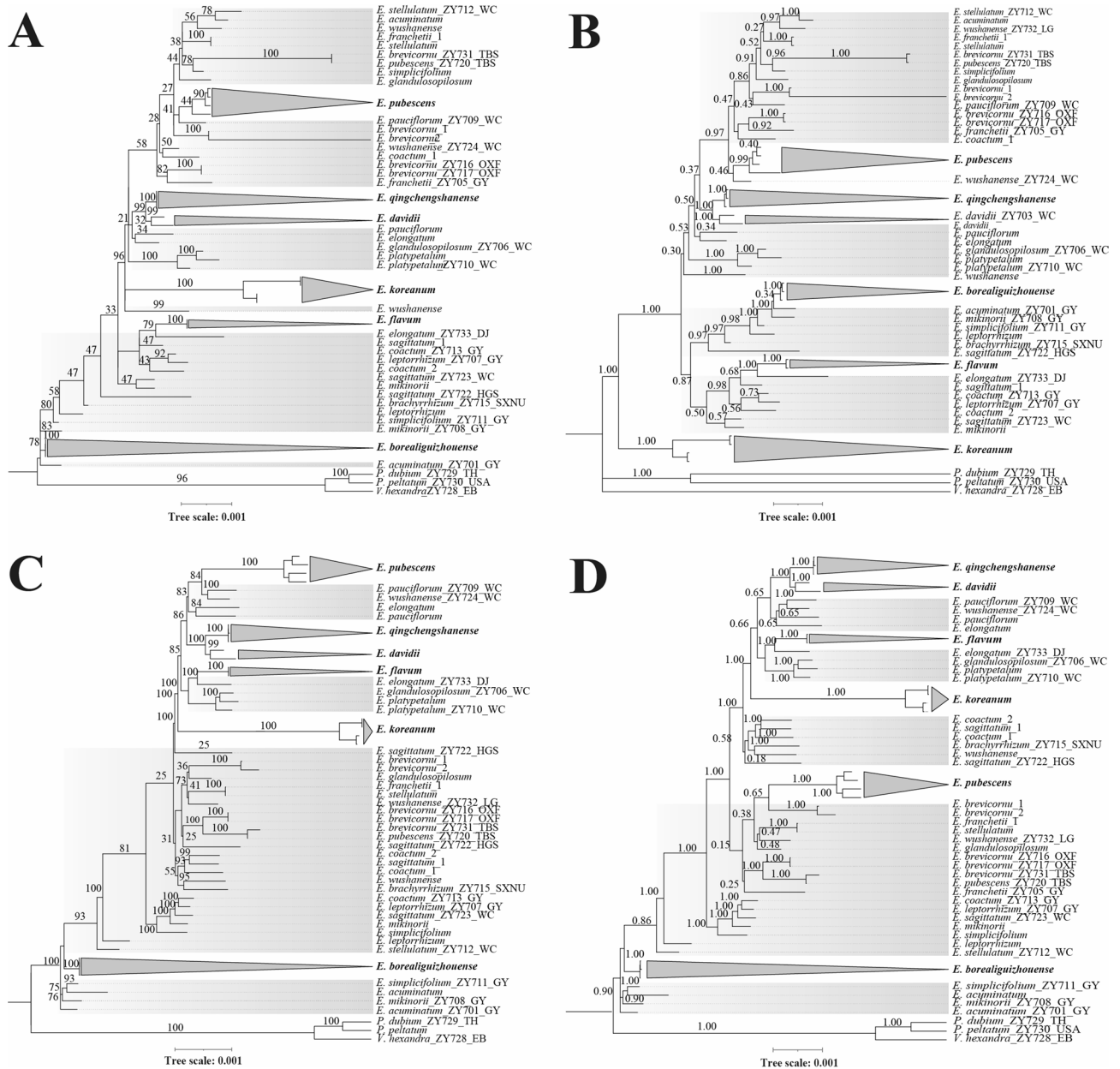


Fig. 6 Phylogenetic tree of *Epimedii* via the maximum-likelihood (ML) and Bayesian inference (BI) method, based on two datasets. **A** ML tree based on hypervariable regions. **B** BI tree based on hypervariable regions. **C** ML tree based on complete plastomes. **D** BI tree based on complete plastomes. Support values > 50% (ML bootstrap)/>0.5 (BI posterior probability) are indicated. All green indicates the species form a monophyletic group in the topological structure with node support values of $\geq 70\%$ bootstrap (ML) and ≥ 0.95 posterior probability (BI)

resolution. In conclusion, the standard barcodes, whether used alone or in combination, effectively identified at most four species: *E. borealiguizhouense*, *E. flavum*, *E. koreanum*, and *E. qingchengshanense*. The tandem hypervariable region dataset exhibited the same circumscription rate as the complete chloroplast genome and showed a slight improvement over the standard barcodes. Overall, both ML and BI methods yielded identical detection rates. Although DNA special barcode in *Epimedii* exhibit distinct advantages for species delineation, low

branch support values were observed for certain clades (Fig. 6, S4, S5).

Single-copy nuclear genes assembly and comparative

Illumina sequencing produced raw data for each sample within a range of approximately 35.165 to 47.798 GB. The number of genes in *Epimedii* ranged from 780 (*Epimedii simplicifolium* 37) to 843 (*E. pubescens* 76D), and the number of genes in the outgroup *Vancouveria chrysantha* was 646 (Table S2). After gene length and

coverage Quality filtering, we obtained a dataset of 698 SCNs. The SCN datasets assessed using both ML and BI methods exhibited a significant improvement in support values compared to standard barcodes, complete chloroplast genomes, and variable regions. *Epimedium stellulatum* proves to be indistinguishable using Super barcodes or standard barcodes, whereas SCN data have favorable

species discrimination power, with a support value of 100% (Fig. 7).

Phylogenetic discordance between chloroplast and nuclear data

Phylogenetic analyses of SCNs (Fig. 8A) and chloroplast genomes (Fig. 8B) revealed substantial topological

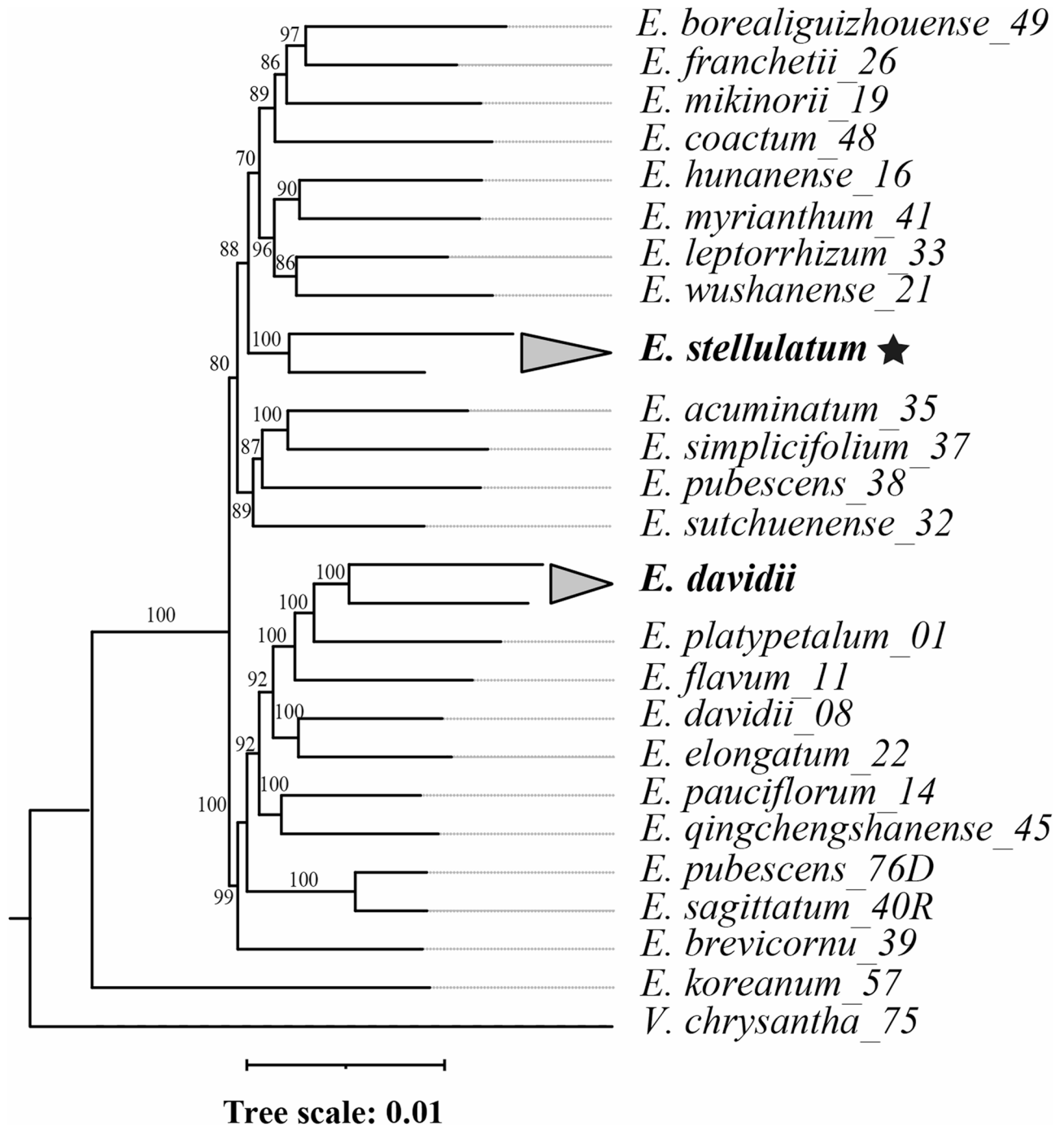


Fig. 7 Phylogenetic tree of *Epimedium* using maximum-likelihood (ML) based on single-copy nuclear genes. Support values > 50% (ML bootstrap) are indicated. All green indicates the species form a monophyletic group in the topological structure with node support values of $\geq 70\%$ bootstrap (ML) and ≥ 0.95 posterior probability (BI)

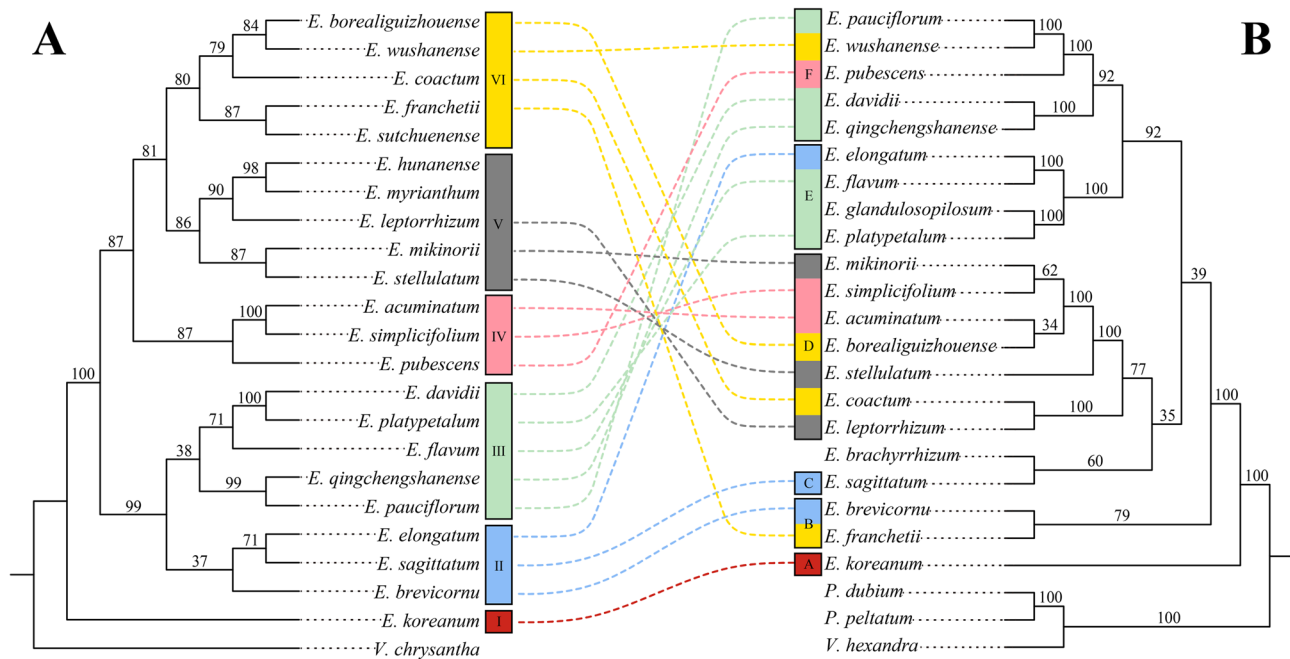


Fig. 8 Phylogenetic conflict between chloroplast and SCNs data in *Epimedium*. **A** ML tree based on single-copy nuclear genes. **B** ML tree based on complete plastomes. The six major clades in the SCN-based tree are labeled with Roman numerals (I - VI), while the corresponding clades in the plastome-based tree are labeled with letters (A | F). The colors of the branches in the SCN tree correspond to the same species in the plastome tree, highlighting the phylogenetic discordance between the two datasets

discordance, underscoring complex evolutionary histories within *Epimedium*. Both trees resolved six major clades (labeled I-VI in SCNs tree and A-F in the chloroplast tree), yet with striking incongruences. For instances, the SCNs-based phylogenetic tree showed robust support (bootstrap support > 85%) for key groupings, with *E. mikinorii* and *E. stellulatum* forming a cohesive lineage in clade V. In contrast, the chloroplast genome-based phylogenetic tree demonstrated a monophyletic grouping of *E. mikinorii* with *E. simplicifolium*. *Epimedium acuminatum* and *E. borealiguizhouense* constituted a distinct monophyletic clade, which together with the clade containing *E. stellulatum*, were nested within a higher-level monophyletic clade. Moreover, *E. pauciflorum*, which clustered with *E. wushanense* in the chloroplast genome-based phylogenetic tree, formed a strongly supported clade (bootstrap support > 95%) with *E. qingchengshanense* in the SCNs phylogeny. Similarly, *E. davidii* shifted from a sister relationship with *E. qingchengshanense* in the chloroplast genome-based phylogenetic tree to grouping with *E. platypetalum* in the SCN-based phylogenetic tree.

Micro-morphological characteristics-based species discrimination

Leaves from 11 species in *Epimedium* disclosed extensive micro-morphological disparities (Table 4). The adaxial epidermal cells of all species are irregular in shape, with a few cells flattened (Fig. 9E1, S6D1, E1, F1), a few slightly

elevated (Fig. 9B1, D1, S6A1, B1), and the others slightly concave (Fig. 9A1, C1, S6C1). The anticlinal walls of abaxial epidermal cells undulate in all species examined, with variations ranging from subtle protrusions (Fig. 9A2, B2, C2, D2, S6A2, B2, C2, D2) to flush alignment with the cell surface (Fig. 9E2, S6E2, F2).

Surfaces of most species presented epicuticular waxes, which were scarce in *E. elongatum* and *E. fangii* (Fig. 9C1–3, D1–3). A broad epidermal wax heterogeneity was observed across species, with higher concentrations found on the abaxial side, contrasting with the lower abundance of adaxial waxes (Fig. 9, S6). Variations in wax morphology consisted of granular (Fig. 9A1, B1, S6A1), membranous platelets (Fig. S6C1, D1, E1), and partial reticulations (Fig. 9E1, S6B1, F1). Meanwhile, the abaxial epidermal wax compositions in diverse species exhibited unique patterns, featuring membranous platelets (Fig. 9B2, S6B2, C2, E2), complemented by reticulate structures in some instances (Fig. 9A2, E2, S6A2), and thread wax patterns in specific situations (Fig. 9B2, S6F2).

Even the stomata of some species are covered with incomplete wax granules or platelets (Fig. 9A3, E3, S6C3, F3). Stomata are randomly distributed only on the abaxial surface, and the stomata are all elliptical in shape. In addition, some stomata were surrounded by distinct protuberances of different shapes, such as rhombic (Fig. 9E2), circular (Fig. S6B2) and triangular (Fig. S6E2), pentagonal (Fig. 9B2). Third, the thickness of the guard cells varied among the species studied. Some species were thick (Fig.

Table 4 Quantitative and qualitative characteristics of leaf epidermal cell across 11 *Epimedium* species

| Plant name | Collection date | Collection location | Voucher | Epidermal cell | | Stomata | | Shape of stomatal pore | Shape of guard cell | Mean stomatal size (µm) LxW | Mean stomatal size (µm) LxW | Epidermal wax layer |
|------------------------------|-----------------|---------------------|-----------|------------------|------------------------------------|--------------|------------------|------------------------|----------------------|-----------------------------|-----------------------------|---|
| | | | | Cell shape AD/AB | Anticlinal cell wall pattern AD/AB | Distribution | Shape of stomata | | | | | |
| <i>Epimedium brevicornu</i> | 19,590,609 | China: Shaanxi | 6694 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | kidney shaped | 23.42x20.07 | 15.99x5.64 | granular and reticulate |
| <i>Epimedium davidii</i> | 193,506 | China: Shaanxi | 63,581 | irregular | undulate | abaxial | wide elliptic | elliptic | kidney shaped | 19.19x16.29 | 10.08x5.71 | granular and membranous platelets |
| <i>Epimedium elongatum</i> | 19,580,602 | China: Sichuan | 77,574 | irregular | undulate | abaxial | circular | elongated elliptic | kidney shaped | 25.23x23.35 | 17.59x8.01 | nearly smooth |
| <i>Epimedium fangii</i> | 1950 | China: Sichuan | 54,585 | irregular | undulate | abaxial | circular | elliptic | narrow kidney shaped | 17.37x16.93 | 8.41x4.98 | nearly smooth |
| <i>Epimedium franchetii</i> | 19,640,409 | China: Chongqing | 107,552 | irregular | undulate | abaxial | wide elliptic | elliptic | narrow kidney shaped | 22.08x17.84 | 11.64x6.04 | partial reticulate |
| <i>Epimedium hunanense</i> | 19,621,028 | China: Hunan | 015367 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | kidney shaped | 24.79x19.97 | 15.54x4.98 | granular and reticulate |
| <i>Epimedium pubescens</i> | 19,640,507 | China: Shaanxi | 2588 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | kidney shaped | 24.98x16.62 | 14.90x6.32 | partial reticulate and membranous platelets |
| <i>Epimedium sagittatum</i> | 20,060,810 | China: Gansu | 2,006,017 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | narrow kidney shaped | 26.26x20.63 | 17.41x6.59 | membranous platelets |
| <i>Epimedium stellulatum</i> | 19,590,809 | China: Hubei | 10,797 | irregular | undulate | abaxial | wide elliptic | elliptic | kidney shaped | 27.98x23.15 | 15.18x8.32 | membranous platelets |
| <i>Epimedium sutchuense</i> | 10,040,408 | China: Shaanxi | 258 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | kidney shaped | 23.93x21.58 | 12.45x5.63 | membranous platelets |
| <i>Epimedium wushanense</i> | 20,050,612 | China: Shaanxi | 2590 | irregular | undulate | abaxial | wide elliptic | elongated elliptic | kidney shaped | 24.66x18.69 | 13.66x5.91 | partial reticulate |

AD and AB refer to adaxial and abaxial leaf surfaces, respectively. Cell dimensions (LxW) indicate length x width (µm)

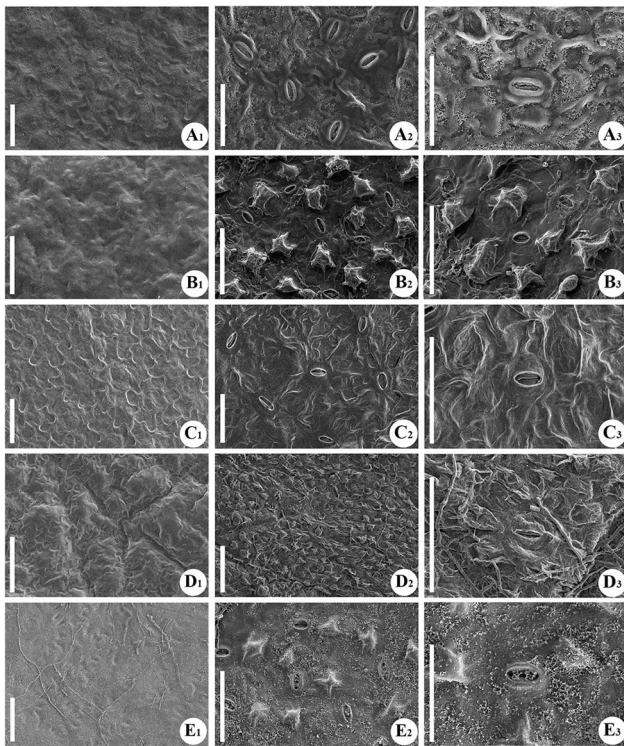


Fig. 9 Characteristics of the epidermal surface of leaves. **A₁–A₃***Epimedium brevicornu*. **B₁–B₃***Epimedium davidii*. **C₁–C₃***Epimedium elongatum*. **D₁–D₃***Epimedium fangii*. **E₁–E₃***Epimedium franchetii*. The images show the epidermis of adaxial leaves and abaxial leaves, and the magnified stomatal apparatus on the abaxial surface in each row from the left to right, respectively

S6B3, C3), moderately thick (Fig. 9A3, S6D3, E3, F3), and some were thin (Fig. 9B3, C3, D3, E3, S6A3).

Homogeneity of variance tests and univariate ANOVA confirmed that all variables met the assumptions of equal variance and exhibited significant interspecific differences (Table S3). Post hoc Tukey HSD tests further delineated species-specific contrasts (Fig. S7; Tables S4, 5, 6, 7). *Epimedium brevicornu* showed highly significant differences in the stomatal area compared to *E. davidii* (mean difference = 261.01, $p < 0.001$), *E. fangii* (mean difference = 252.50, $p < 0.001$), and *E. franchetii* (mean difference = 218.51, $p < 0.001$), but exhibited minor differences with *E. sagittatum* and *E. stellulatum* ($p \geq 0.05$). *Epimedium elongatum* differed significantly from *E. brevicornu* (mean difference = -101.49, $p < 0.001$) and *E. davidii* (mean difference = -362.49, $p < 0.001$), but not from other species, suggesting that stomatal area holds high diagnostic value in specific species pairs.

Stomatal length-to-width ratios also varied significantly among species. For instance, *E. brevicornu* differed markedly from *E. elongatum* (mean difference = 0.218, $p = 0.002$), *E. fangii* (mean difference = 0.262, $p < 0.001$), and *E. sutchuenense* (mean difference = 0.219, $p = 0.002$), but showed no significant differences with other species

($p \geq 0.05$). *Epimedium elongatum* also differed significantly from *E. hunanense* (mean difference = -0.189, $p = 0.014$) and *E. wushanense* (mean difference = -0.205, $p = 0.006$), indicating that stomatal length-to-width ratios serve as a key feature for distinguishing certain species.

In stomatal pore area, *E. elongatum* differed significantly from most species (e.g., *E. davidii*, *E. fangii*, *E. franchetii*, *E. hunanense*, *E. pubescens*, *E. sutchuenense*; $p < 0.001$), whereas *E. pubescens* showed no significant differences with *E. brevicornu*, *E. fangii*, *E. franchetii*, or *E. hunanense* ($p \geq 0.05$), suggesting strong discriminatory power of stomatal pore area among some closely related species (Fig. S7C). For stomatal pore length-to-width ratios, *E. brevicornu* differed significantly from *E. davidii* (mean difference = 1.024, $p = 0.003$), *E. fangii* (mean difference = 0.941, $p = 0.008$), *E. stellulatum* (mean difference = 0.848, $p = 0.024$), and *E. sutchuenense* (mean difference = 0.899, $p = 0.013$). *Epimedium hunanense* exhibited significant differences from most species (absolute mean difference > 1.2 , $p < 0.001$), indicating its unique stomatal pore length-to-width ratio as a diagnostic trait (Fig. S7D).

Principal Component Analysis (PCA) extracted two principal components, cumulatively explaining 83.90% of the variance (Fig. S8). Principal Component 1 (PC1) accounted for 51.10% of the total variance, primarily reflecting stomatal size traits, dominated by stomatal area (loading = 0.962) and stomatal pore area (loading = 0.967), which were highly positively correlated ($r = 0.876$, $p < 0.001$). Principal Component 2 (PC2) explained 32.80% of the variance, capturing stomatal shape characteristics, driven by stomatal length-to-width ratio (loading = 0.856) and stomatal pore length-to-width ratio (loading = 0.856), which showed moderate positive correlation ($r = 0.479$, $p < 0.001$).

The PCA score plot (Fig. S8) displayed clustering patterns in the PC1-PC2 space. For example, *E. stellulatum* scored high on PC1 (indicating larger stomatal and pore areas) but low on PC2, while *E. hunanense* scored markedly high on PC2 (reflecting elongated stomatal morphology with higher length-to-width ratios). The above analyses collectively demonstrate that the leaf epidermal micro-morphological characteristics of *Epimedium* exhibit typical inter-specific specificity, serving as a complementary approach to molecular evidence for species delimitation (Fig. S9).

Discussion

The structure of the chloroplast genome in *Epimedium* and its evolutionary implications

The chloroplast genome of *Epimedium* exhibits a dynamic equilibrium between structural conservation and lineage-specific differentiation, providing critical clues for unraveling the evolutionary history of this genus [61, 63, 64]. Although the IR/LSC/SSC boundaries are

highly conserved in most species (Fig. 3, S3), consistent with the slow evolutionary rate of chloroplast genomes, two notable exceptions reveal adaptive differentiation phenomena. In our study, the IR region within the genus *Epimedium* of Podophylloideae varies significantly by up to about 1,000 bp, while the Subfamily Berberidoideae displays a remarkable amplification of the IR region, with an increase of approximately 10,000 bp (Fig. 3, S3). Secondly, there are interspecific differences in the localization of IR-SC boundary-adjacent genes (such as *rpl2*, *rpl22*, *rpl23*, *ycf1*, *rpl19*, *trnI*, and *trnH*). For example, *E. wushanense* is characterized by an expansion of the IR region compared to some species in *Epimedium*, a feature that can be used for preliminary species identification. However, samples of some species are subject to fragmentation in the plastid phylogenetic tree because the matrilineal genetic properties of chloroplasts may be affected by hybridization or incomplete genealogical sorting [29]. While these boundary shifts themselves lack direct species-discriminating power, they provide a contextual framework for evolutionary trajectories—conserved boundaries reflect deep genomic stability, whereas structural anomalies suggest lineage-specific adaptations [70–72].

A genus-defining *trnQ-UUG* rearrangement further underscores chloroplast architecture's taxonomic relevance. Unique to *Epimedium* (Fig. 2 and 3), this tRNA-Q locus variation serves dual roles: its presence distinguishes the genus from other Berberidaceae [73, 74]. At the same time, intra-generic duplication events in the LSC region correlate with speciation patterns (Fig. 2 and 3). Unlike the homogenous SSR distributions (Fig. 4), which suggest recent radiation or conserved ancestral polymorphisms [75, 76]. This structural innovation clarifies species relationships through duplication mapping, bridging the gap between genomic architecture and taxonomic resolution.

Repeat element analyses reveal additional evolutionary pressures. Microsatellites, tandem repeats, and large repeats within the genus *Epimedium* exhibit variations in quantity, type, distribution, and length across different species (Fig. 4). This hints at either recent diversification preserving ancestral patterns or selective maintenance of functional repeats [76]. While insufficient for species delimitation alone, these repeat signatures complement nuclear and morphological data by exposing cryptic evolutionary forces shaping genome organization.

Collectively, chloroplast structural features resolve *Epimedium* taxonomic complexities through evolutionary contextualization. Conserved elements (e.g., majority IR boundaries, SSR abundance) reflect deep phylogenetic stability, while exceptions (*trnQ-UUG* rearrangements, lineage-specific IR contractions) mark adaptive innovations. Critically, these patterns gain taxonomic relevance

when integrated with multilayered data: the *trnQ-UUG* rearrangement validates genus monophyly while guiding species-level distinctions, and repeat distributions expose evolutionary pressures invisible to single-marker analyses. This synthesis is consistent with the study's overall framework, demonstrating how structural conservation and divergence together reveal a dual narrative of ancient genomic stability and recent adaptive diversification in the genus.

Multi-source data for species circumscription in *Epimedium*

The limitations of standard barcodes became evident when addressing challenging taxa, prompting the investigation of more comprehensive genomic approaches [44]. The introduction of complete chloroplast genomes expanded the scope of species circumscription, offering enhanced resolution and detail [11]. Yet, the high costs associated with this method impeded its widespread adoption. Consequently, the focus shifted to hypervariable regions within specific taxa, designated as special barcodes [77]. In our study, we utilized the whole chloroplast genome and highly variable regions to improve the accuracy of the phylogenetic tree and species discrimination rate, surpassing traditional molecular markers such as *rbcL*, *matK*, and *psbA-trnH*. (Fig. S4, S5). Here, we were able to effectively identify *E. pubescens* when traditional molecular markers failed to, but this approach was not exhaustive for circumscribing other species within *Epimedium*. Specifically, compared with the core barcodes, circumscription based on the chloroplast genome is usually more reliable.

According to our findings, the adoption of SCNs led to a marked increase in the support values of the constructed phylogenetic tree of *Epimedium*, far surpassing the reliance on chloroplast DNA (Fig. 7). Despite the inherent limitations of our study, including the relatively sparse sampling across species and the absence of duplicate sequences for robust statistical validation, it is in line with other findings [78–80]. Collaborative efforts have collectively painted a compelling picture of the immense potential of SCNs in species discrimination. By tapping into the untapped potential of the nuclear genome, SCNs have the capacity to serve as robust nuclear molecular markers, offering an unprecedented level of precision and accuracy in species delimitation [81].

The nuclear-cytoplasmic discordance between chloroplast phylogenies and SCN topologies highlights the limitations of single-locus molecular approaches in delimiting species boundaries. Such incongruences likely stem from biological processes including interspecific hybridization, incomplete lineage sorting, and distinct evolutionary pressures on nuclear versus plastid genomes [82].

Complementing a genomic approach, we advocate for the inclusion of micro-morphological characters as micro-morphological barcodes in the species circumscription process (*Pulsatilla*: [83]; *Mahonia*: [84]). Here, our study reveals different micro-morphological features among different species in *Epimedium* (Fig. 9, S6). For instance, phylogenetic analyses using either chloroplast genomes or single-copy nuclear genes consistently demonstrate non-monophyly in *E. franchetii* and *E. sagittatum* samples. This indicates the inadequacy of these molecular markers for precise species delimitation. However, leaf epidermal micro-morphology revealed striking divergences. In *E. franchetii*, both adaxial and abaxial surfaces exhibit granular epidermal wax coalescing into incomplete reticulate plates. Its stomata are additionally covered by fragmented reticulate wax, surrounded by irregular quadrilateral protrusions. In contrast, *E. sagittatum* displays dense granular epidermal wax on both leaf surfaces, aggregating into partial reticulate structures in specific regions, with stomata lacking irregular protrusions. Principal component analysis (PCA) distinctly clustered these two species into separate groups (Fig. S8). Post hoc tests further demonstrated significant differences ($P < 0.01$) in stomatal area, stomatal aperture area, and aperture length-to-width ratio. These findings substantiate that leaf epidermal micro-morphology provides effective diagnostic criteria when molecular evidence is insufficient for taxonomic delimitation [60].

Drivers of phylogenetic discordance in *Epimedium*

Phylogenetic trees of *Epimedium* were constructed based on 698 single-copy nuclear genes (Figs. 7 and 8A), revealing significant topological discrepancies between them. Tree A (Fig. 7), which incorporated replicate samples within species, exhibited consistently high nodal support (all bootstrap values $> 70\%$). In contrast, Tree B (Fig. 8A), constructed after removing replicate samples, showed substantially reduced support at specific nodes (e.g., down to 38%) and altered the clustering relationships of key species. This inconsistency was primarily driven by: (1) Intraspecific genetic variation introduced by replicate samples obscured interspecific differentiation signals [85]. In Tree A, multiple samples of the same species (e.g., *E. stellulatum* and *E. davidii*) formed highly supported monophyletic clades, but their intraspecific variation might be misinterpreted as interspecific divergence, leading to erroneous clustering (e.g., association between *E. stellulatum* and *E. mikinorii*). Tree B reduced intraspecific noise by excluding replicates, thereby exposing conflicting signals like incomplete lineage sorting (ILS) or gene flow among gene trees, which decreased nodal support. (2) Long-branch attraction (LBA) was more pronounced in Tree A [86]. Replicate samples formed long branches due to rapid intraspecific evolution, causing

artificial clustering with taxa having similar evolutionary rates. After removing long-branch samples, Tree B mitigated LBA effects and revealed the true topology, though support for some short branches declined due to weak signal. Additionally, data missingness and model bias exacerbated topological conflicts [87]. In Tree A, replicates filled missing data for certain genes, improving site occupancy and nodal support but potentially masking gene tree heterogeneity. In contrast, sparse data from single samples in Tree B made the algorithm sensitive to missing sites, resulting in support fluctuations. Future studies should integrate gene tree heterogeneity using species tree methods (e.g., ASTRAL) and validate contentious nodes with morphological or population genomic data.

The failure of individuals from the same species to cluster into a single branch on a phylogenetic tree (non-monophyly) typically stems from the complexity of evolutionary processes or methodological limitations. First, evolutionary mechanisms may play a dominant role. For instance, during early species divergence, incomplete lineage sorting (ILS) can occur if ancestral genetic polymorphisms are not fully fixed randomly, causing different individuals to carry distinct ancestral gene fragments and leading to chaotic genetic signals [88]. Natural hybridization or introgression between species may also disrupt species boundaries via gene flow, scattering individuals across divergent branches [89]. Second, biodiversity itself might be underestimated, such as unrecognized cryptic species (morphologically similar but genetically distinct) being misclassified, which distorts clustering outcomes [90]. Finally, convergent evolution or rapid radiative evolution can drive unrelated species to independently develop similar traits under analogous environmental pressures, despite significant genomic divergence, creating conflicts between morphological and molecular data [85]. These factors highlight the need for integrating multi-gene analyses, expanding sampling, and combining ecological and morphological evidence to resolve evolutionary relationships accurately.

Topological conflicts between organellar and nuclear phylogenies (e.g., chloroplast vs. SCNs) arise from inherent genetic mechanisms and methodological biases. The uniparental inheritance of chloroplasts fundamentally differs from biparental nuclear recombination, leading to divergent evolutionary trajectories. For instance, *E. pauciflorum* and *E. wushanense* cluster in chloroplast trees but form a sister clade with *E. qingchengshanense* in nuclear gene trees (Fig. 8), reflecting historical chloroplast capture via hybridization events [29, 30]. Incomplete lineage sorting (ILS) further explains unstable placements (e.g., *E. mikinorii* in Fig. 8), particularly in rapidly radiating groups like *Epimedium* that diversified during Himalayan uplift [58]. Methodological limitations

compound these conflicts: uneven taxonomic sampling (e.g., *E. hunanense* exclusively in SCN datasets) reduces topological comparability, while the low variability of chloroplast genomes (evidenced by limited barcode discrimination in Fig. 6) contrasts with the high resolution of SCNs capturing rapidly evolving loci (Fig. 7), necessitating integrated approaches for resolving recent radiations [42, 81].

Critically, these inconsistencies do not diminish the utility of individual datasets but instead highlight the complementary strengths of a multi-layered approach. The Multilayer Precision Species Circumscription Approach (MPSCA) leverages chloroplast genomes for deep evolutionary insights, SCNs for fine-scale species delimitation, and micro-morphology to validate molecular hypotheses—exemplified by distinguishing *E. franchetii* and *E. sagittatum* through epidermal wax patterns when genomic data alone proved insufficient (Fig. 9). By reconciling discordant signals across datasets, MPSCA transforms phylogenetic conflict into a diagnostic tool, advancing species delimitation in taxonomically complex groups where no single method suffices.

Towards a holistic approach to species circumscription

Our research now introduces a forward-looking strategy for species discrimination: the use of SCNs for precise species circumscription in plant groups where chloroplast genome has been proven inadequate. To overcome the limitations of individual methods of species circumscription, we propose a novel Multilayer Precision Species Circumscription Approach (MPSCA) that integrates chloroplast genome data, SCNs and micro-morphological features (Fig. 10). First, when we get several “unknown species” with processed, crushed, dried material, or other

treated forms, we should use short molecular markers (such as ITS, *matK*, *rbcL*, and *trnH-psbA*) for preliminary delimitation. If the initial results were uncertain, we further employed chloroplast genome analysis to improve accuracy. If species delimitation remained unclear, we then utilized SCNs for delimitation. When identifying plants, we do not necessarily have to proceed to the very last step. When the range of plants determined at a certain step is small enough but still not precise, we can integrate micro-morphological evidence to improve the accuracy of identification.

To validate the MPSCA, this study implemented a hierarchical verification framework integrating molecular and morphological evidence. Initial screening using standard DNA barcodes successfully delineated four species (*E. borealiguizhouense*, *E. flavum*, *E. koreanum*, and *E. qingchengshanense*) as highly supported monophyletic clades, while ambiguous taxa like *E. pubescens* required further resolution through chloroplast genome analysis. Subsequent integration of hypervariable chloroplast regions established six species (including *E. pubescens*) as distinct lineages with enhanced nodal support. For taxa with persistent phylogenetic ambiguities in chloroplast phylogenies (e.g., *E. stellulatum*), single-copy nuclear genes (SCNs) provided critical discriminative power, resolving *E. stellulatum* as a strongly supported monophyletic group. Micro-morphological characteristics (e.g., stomatal area and size) were integrated to address cases with insufficient genetic resolution, effectively differentiating between *E. brevicornu* and *E. stellulatum*. Application scenario analysis revealed differential requirements: *E. koreanum* identification required only standard barcodes with micro-morphological verification, *E. pubescens* necessitated chloroplast genome and

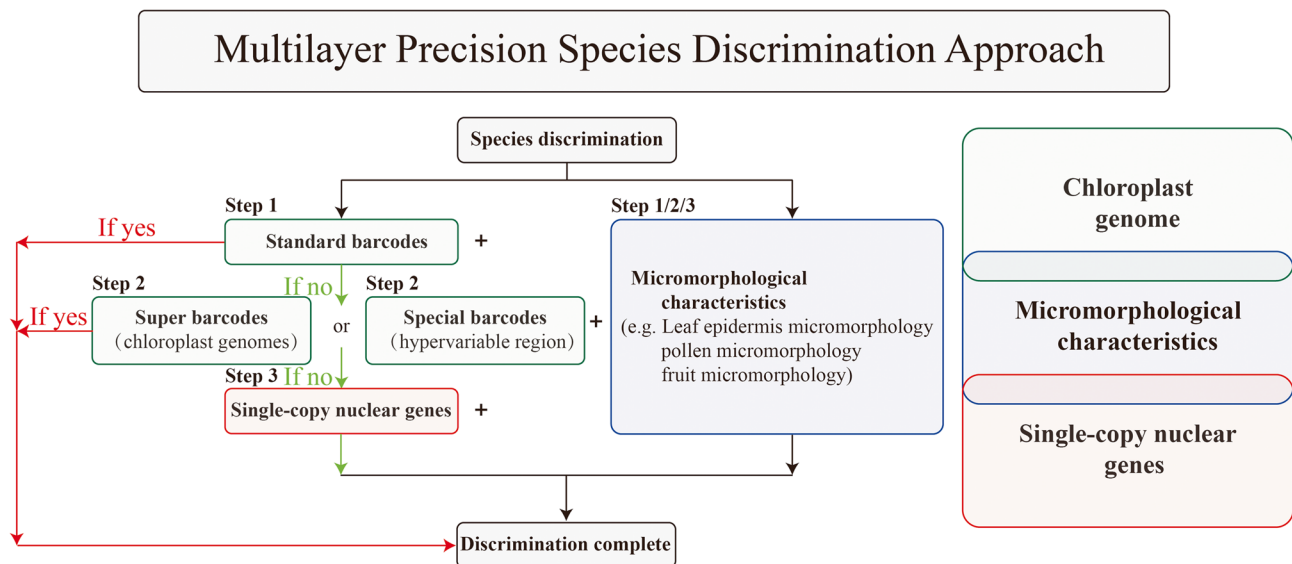


Fig. 10 Multilayer Precision Species Discrimination Approach

micro-morphological integration, while *E. stellulatum* demanded combined SCNs and micro-morphological analysis.

The significance of this approach lies in its capacity to effectively address the limitations inherent in traditional species identification methods [91, 92]. For instance, reliance solely on chloroplast genome data may result in inaccurate species delimitation, particularly in taxa characterized by hybridization or genetic introgression. In contrast, the incorporation of SCNs offers more reliable nuclear gene information, thereby compensating for the shortcomings of chloroplast genomes [93, 94]. Furthermore, the integration of micro-morphological traits enhances identification reliability, especially when molecular data fail to yield definitive conclusions for closely related species [94, 95]. By employing this multi-layered, evidence-based approach, we not only improve the accuracy of species identification but also provide robust data support for phylogenetic studies of complex taxa.

The application of this approach holds significant potential across various fields, including biodiversity research, conservation biology, and the development of medicinal plant resources. For instance, within the genus *Epimedium*, many species possess considerable medicinal value; however, their morphological similarities make them challenging to distinguish using traditional identification methods. Our multi-layered precise species delimitation approach (MPSCA) enables rapid and accurate identification of these species, thereby offering a scientific foundation for the sustainable development and conservation of medicinal resources. Moreover, this method can be adapted to other plant taxa, providing an efficient and standardized framework for advancing plant taxonomy and phylogenetic studies.

Limitations of this study include the insufficient number of replicate samples within the single-copy nuclear gene (SCN) dataset, which complicates the assessment of its species discrimination capability. For instance, uneven taxonomic sampling—such as *E. hunanense* being exclusively represented in the SCN dataset—limits cross-dataset comparability and may introduce biases in phylogenetic inference. Additionally, the extraction process for SCNs is complex, increasing both cost and labor [28]. Moreover, the computational demands associated with handling large-scale genomic data can be substantial [96]. These factors constrain the reliability and applicability of our findings. It should be noted that not all single-copy nuclear genes are used to identify species. Screening some nuclear gene fragments with hypervariable regions as much as possible is an ideal approach. Beyond methodological constraints, biological complexities such as morphological plasticity exacerbate taxonomic ambiguity. While expert validation and micro-morphological traits (e.g., stomatal wax patterns) were employed to mitigate

errors, cryptic species detection in phenotypically plastic groups like *Epimedium* demands higher-resolution tools [90]. With ongoing technological advancements and increased data availability, this approach will be poised to further breakthroughs and advancements in the field of plant species circumscription, enabling a more accurate understanding of the phylogenetic relationships and species diversity of problematic groups.

Conclusion

This study shed light on the strong discriminatory potential of chloroplast and nuclear data, as well as the assistance of micro-morphological characteristics. We present the Multilayer Precision Species Discrimination Approach, which provides a rational approach to species circumscription, emphasizing its critical role in improving plant taxonomic accuracy and resource management efficiency. This comprehensive work breaks the boundaries of traditional DNA barcodes and improves the accuracy of species circumscription. Nonetheless, future research needs to address the problem of sparse sampling and simplify access to SCNs. At the same time, many plant taxa still lack chloroplast, single-copy nuclear gene barcodes and micro-morphological information, especially the latter two. The construction of molecular barcode and micro-morphological databases for global plants still faces huge challenges.

Materials and methods

Taxon sampling, DNA extraction, and sequencing

The plant samples in this study primarily comprise three parts: chloroplast genomes, single-copy nuclear genes, and leaf epidermal micro-morphology data.

Concerning the leaf epidermal micro-morphology data, we examined 11 samples from 11 species. The materials were sourced from the historical collections of Herbarium of Northwest A&F University (WUK), and voucher specimens are listed in Table 4.

Regarding chloroplast genome data, we assembled and annotated 30 chloroplast genome sequences, including 27 *Epimedium* sequences (covering 21 *Epimedium* species) and three outgroup sequences (*Plagiorhegma dubium*, *Podophyllum peltatum*, *Vancouveria chrysantha*) (Table 5). In addition, we got 27 fully assembled and annotated chloroplast genome sequences from the National Center of Biotechnology Information. Thus, the chloroplast genome dataset contains a total of 57 sequences. NCBI accession numbers for chloroplast genomes and raw sequencing data are provided in Table 1, with full specimen metadata available in Table S8. All voucher specimens were morphologically identified by Professor Zhao Liang and are deposited in WUK.

For the single-copy nuclear genes data, we collected a total of 27 samples from 22 species, including 26

Table 5 Voucher information and GenBank accession numbers for *Epimedium* and outgroup species from WUK and IMPD

| Taxon | Collection Site | Collectors | Collection numbers | Date | Voucher specimen | Accession | SRA accession | Data analysis | |
|-------------------------------------|-----------------|-------------|--------------------|------------|------------------|-----------|----------------------|---------------|-------------|
| | | | | | | | | Nuclear | Chloroplast |
| <i>Epimedium acuminatum</i> | China: Guizhou | Yu Zhang | 701 | 20,210,403 | WUK ZY701 | PV192894 | SRX27229214 | ✓ | ✓ |
| | China: Guizhou | Mengyue Guo | 0342 | 20,180,520 | IMPD Guo0342 | PV192895 | SRX20954640 | ✓ | ✓ |
| <i>Epimedium borealiguizhouense</i> | China: Guizhou | Yu Zhang | 702 | 20,210,403 | WUK ZY702 | | SRX27229215 | ✓ | ✓ |
| | China: Guizhou | Mengyue Guo | 0338 | 20,180,520 | IMPD Guo0338 | | SRX20954655 | ✓ | ✓ |
| | | | | | | | MN873561 NC044889 | | ✓ ✓ |
| <i>Epimedium brachyrrhizum</i> | China: Shaanxi | Yu Zhang | 715 | 20,200,930 | WUK ZY715 | PV192904 | SRX27229220 | ✓ | ✓ |
| <i>Epimedium brevicornu</i> | UK | Yu Zhang | 716 | 20,190,820 | WUK ZY716 | PV192900 | SRX27229221 | ✓ | ✓ |
| | China: Shaanxi | Yu Zhang | 731 | 19,390,505 | ZY731 | PV192902 | SRX27229234 | ✓ | ✓ |
| <i>Epimedium coactum</i> | China: Gansu | Xiang Liu | 18,042 | 20,180,520 | Liu18042 | | SRX20954644 | ✓ | ✓ |
| | | | | | | | MT560406 MN714008 | | ✓ ✓ |
| | China: Guizhou | Yu Zhang | 713 | 20,210,403 | ZY713 | PV192907 | SRX27229218 | ✓ | ✓ |
| | China: Guizhou | Mengyue Guo | 0319 | 20,180,520 | Guo0319 | | SRX20954654 | ✓ | ✓ |
| <i>Epimedium davidii</i> | | | | | | | MT560395 MT560402 | | ✓ ✓ |
| | China: Sichuan | Yu Zhang | 703 | 20,210,422 | ZY703 | PV192910 | SRX27229226 | ✓ | ✓ |
| | China: Sichuan | Xiang Liu | 18,030 | 20,180,421 | Liu18030 | | SRX20954646 | ✓ | ✓ |
| | China: Sichuan | Xiang Liu | 18,033 | 20,180,512 | Liu18033 | | SRX20954679 | ✓/✓ | ✓ |
| | China: Sichuan | Xiang Liu | 18,036 | 20,180,516 | Liu18036 | | SRX20954690 | ✓ | ✓ |
| <i>Epimedium elongatum</i> | China: Sichuan | Yu Zhang | 733 | 19,740,603 | ZY733 | PV192915 | SRX27229236 | ✓ | ✓ |
| | China: Sichuan | | 287 | 20,190,413 | Zhang287 | | SRX20954626 | ✓ | ✓ |
| <i>Epimedium flavum</i> | China: Sichuan | Yu Zhang | 704 | 20,210,422 | ZY704 | PV192918 | SRX27229237 | ✓ | ✓ |
| | China: Sichuan | | 289 | 20,190,413 | Zhang289 | | SRX20954614 | ✓ | ✓ |
| <i>Epimedium franchetii</i> | | | | | | | MW483093 | | ✓ |
| | China: Guizhou | Yu Zhang | 705 | 20,210,403 | ZY705 | PV192906 | SRX27229238 | ✓ | ✓ |
| | China: Hubei | Xiang Liu | 18,021 | 20,180,520 | Liu18021 | | SRX20954659 | ✓ | ✓ |
| <i>Epimedium glandulosopilosum</i> | | | | | | | NC065479 | | ✓ |
| | China: Sichuan | Yu Zhang | 706 | 20,210,422 | ZY706 | PV192916 | SRX27229239 | ✓ | ✓ |
| <i>Epimedium hunanense</i> | China: Hunan | Mengyue Guo | 0402 | 20,180,520 | Guo0402 | | SRX20954619 | ✓ | ✓ |
| <i>Epimedium koreanum</i> | China: Jilin | Yu Zhang | 718 | 20,140,427 | ZY718 | PV192919 | SRX27229223 | ✓ | ✓ |
| | China: Jilin | Yu Zhang | 719 | 20,140,427 | ZY719 | PV192920 | SRX27229224 | ✓ | ✓ |
| | Korea | | 05 | 20,190,801 | JP05 | | SRX20954664 | ✓ | ✓ |
| <i>Epimedium leptorrhizum</i> | | | | | | | MT560411 KM207675 | | ✓ ✓ |
| | China: Guizhou | Yu Zhang | 707 | 20,210,403 | ZY707 | PV192909 | SRX27229240 | ✓ | ✓ |
| | China: Guizhou | Mengyue Guo | 0321 | 20,190,413 | Guo0321 | | SRX20954638 | ✓ | ✓ |
| <i>Epimedium mikinorii</i> | | | | | | | NC062453 | | ✓ |
| | China: Guizhou | Yu Zhang | 708 | 20,210,403 | ZY708 | PV192896 | SRX27229241 | ✓ | ✓ |
| | China: Hubei | Mengyue Guo | 0431 | 20,180,520 | Guo0431 | | SRX20954622 | ✓ | ✓ |
| | | | | | | | NC044890 | | ✓ |

Table 5 (continued)

| Taxon | Collection Site | Collectors | Collection numbers | Date | Voucher specimen | Accession | SRA accession | Data analysis |
|------------------------------------|-----------------|-------------|--------------------|------------|------------------|-----------|---------------|---------------|
| <i>Epimedium myrianthum</i> | China: Hunan | Mengyue Guo | 0421 | 20,190,413 | Guo0421 | | SRX20954647 | ✓ |
| <i>Epimedium pauciflorum</i> | China: Sichuan | Yu Zhang | 709 | 20,210,422 | ZY709 | PV192912 | SRX27229242 | ✓ |
| | China: Sichuan | | 278 | 20,190,413 | Zhang278 | | SRX20954617 | ✓ |
| <i>Epimedium platypetalum</i> | China: Sichuan | Yu Zhang | 710 | 20,210,422 | ZY710 | PV192917 | SRX27229243 | ✓ |
| | China: Sichuan | Xiang Liu | 18,038 | 20,180,518 | Liu18038 | | SRX20954612 | ✓ |
| | | | | | | MW483078 | | ✓ |
| <i>Epimedium pubescens</i> | China: Shaanxi | Yu Zhang | 720 | 20,140,406 | ZY720 | PV192903 | SRX27229225 | ✓ |
| | China: Sichuan | Yu Zhang | 721 | 20,210,422 | ZY721 | PV192913 | SRX27229227 | ✓ |
| | China: Shaanxi | Mengyue Guo | 0456 | 20,180,520 | Guo0456 | | SRX20954643 | ✓ |
| | China: Sichuan | | | 20,190,326 | JYZRM | | SRX20954684 | ✓ |
| <i>Epimedium qingchengshanense</i> | | | | | | MT560420 | | ✓ |
| | | | | | | NC053532 | | ✓ |
| | | | | | | MN939633 | | ✓ |
| | China: Sichuan | Yu Zhang | 714 | 20,210,422 | ZY714 | PV192911 | SRX27229219 | ✓ |
| <i>Epimedium sagittatum</i> | China: Sichuan | Xiang Liu | 16,025 | 20,190,413 | Liu16025 | | SRX20954651 | ✓ |
| | | | | | | NC053539 | | ✓ |
| | | | | | | MT560415 | | ✓ |
| <i>Epimedium simplicifolium</i> | China: Shaanxi | Yu Zhang | 722 | 20,210,729 | ZY722 | PV192905 | SRX27229228 | ✓ |
| | China: Sichuan | Yu Zhang | 723 | 20,210,422 | ZY723 | PV192908 | SRX27229229 | ✓ |
| | China: Sichuan | | | 20,190,326 | JYZJY | | SRX20954645 | ✓ |
| <i>Epimedium stellulatum</i> | | | | | | MN027267 | | ✓ |
| | China: Guizhou | Yu Zhang | 711 | 20,210,403 | ZY711 | PV192897 | SRX27229216 | ✓ |
| | China: Sichuan | Mengyue Guo | 0342 | 20,190,413 | Guo0343 | | SRX20954642 | ✓ |
| <i>Epimedium sutchuenense</i> | | | | | | NC053529 | | ✓ |
| | China: Sichuan | Yu Zhang | 712 | 20,210,422 | ZY712 | PV192898 | | ✓ |
| | China: Hubei | Xiang Liu | 18,025 | 20,190,413 | Liu18025 | | SRX20954661 | ✓ |
| <i>Epimedium wushanense</i> | China: Hubei | Mengyue Guo | 0443 | 20,180,520 | Guo0443 | | SRX20954648 | ✓ |
| | | | | | | MN027267 | | ✓ |
| | China: Hubei | Mengyue Guo | 0437 | 20,180,520 | Guo0437 | | SRX20954637 | ✓ |
| <i>Vancouveria chrysantha</i> | China: Sichuan | Yu Zhang | 724 | 20,210,422 | ZY724 | PV192914 | SRX27229230 | ✓ |
| | China: Shaanxi | Yu Zhang | 732 | 20,050,613 | ZY732 | PV192899 | SRX27229235 | ✓ |
| | China: Hubei | Mengyue Guo | 0434 | 20,180,520 | Guo0434 | | SRX20954625 | ✓ |
| <i>Vancouveria hexandra</i> | USA | Yu Zhang | 728 | 2021 | ZY728 | PV192921 | SRX27229231 | ✓ |
| <i>Plagiorhegma dubium</i> | USA | Yu Zhang | 729 | 20,160,518 | ZY729 | PV192922 | SRX27229232 | ✓ |
| <i>Podophyllum peltatum</i> | USA | Yu Zhang | 730 | 20,150,501 | ZY730 | PV192923 | SRX27229233 | ✓ |

Epimedium samples and one outgroup sample, *V. chrysantha*. All specimens were identified by Professor Bao-lin Guo, and the voucher specimens are deposited at the Institute of Medicinal Plant Development, Chinese Academy of Medical Sciences (IMPD). Details are listed in Table 5 and S2.

The genus *Epimedium* comprises approximately 60-70 species globally, with China serving as its center

of diversity, harboring ~80% of the described species, many of which are endemic and medicinally significant. Our sampling strategy prioritized Chinese endemic taxa and morphologically complex species frequently involved in medicinal adulteration. Specifically, species were selected to: (1) represent major geographic distributions across China, covering key biodiversity hotspots such as the Hengduan Mountains, Qinling Mountains,

and southwestern karst regions; (2) include taxonomically challenging groups with overlapping morphological traits (e.g., *E. sagittatum*, *E. acuminatum*); and (3) incorporate species of high medicinal value but prone to misidentification in commercial markets (e.g., *E. brevicornu*, *E. wushanense*). This approach ensured coverage of both phylogenetic diversity and practical identification challenges.

The total genomic DNA was extracted using the cetyltrimethylammonium bromide (CTAB) method [97] and sequenced using the Beijing Genetic Institute (BGI) Illumina Miseq platform (Illumina, San Diego, CA, USA). Raw sequences were trimmed using Trimmomatic v0.40 [98] to remove low-quality reads and adapter sequences.

Chloroplast genome assembly and annotation

We collected approximately 11 GB of high-quality data for each sample (Table 1) and assembled the quality-filtered reads using GetOrganelle [99], with *Epimedium coactum* (GenBank accession: MT560395) used as a reference. Chloroplast genomes were annotated using the Plastid Genome Annotator (PGA: [100]) with the default parameters, and verified for accuracy by GeSeq [101]. Finally, we performed minor manual corrections using Geneious v11.0.20 [102]. The circular plastome map of *Epimedium* was then visualized using the online tool OGDRAW [103].

Single-copy nuclear marker development and single-copy nuclear genes assembly

The SCN marker development and the assembly process are referenced in Liu et al. (2021) [42], and whole genome and transcriptome data were obtained for *E. pubescens* (China National Center for Bioinformation accession: GWHBECS00000000), *Nandina domestica* (OneKP), *Podophyllum peltatum* (OneKP), and *Coptis chinensis* (GenBank assembly accession: GCA 015680905.1). All coding regions were extracted from the genomes using gffread [104], and input into MarkerMiner v1.2 [105]. To identify putative single-copy genes in *Epimedium*, MarkerMiner v1.2 was used with the following specific parameters: -minTranscriptLen 600, -minProteinCoverage 50, -minTranscriptCoverage 50, and -minSimilarity 50. The genes extracted through these parameters were then utilized as reference genes for subsequent assembly.

We used Trimmomatic v. 0.40 to remove adapters and Quality filters on raw reads. The results are then input into FastQC v. 0.11.9 [106] for quality control. Finally, Hybpiper v2.1.2 [107] was utilized to assemble single-copy nuclear genes. Briefly, we used BWA v. 0.7.1 [108] to align reads from *Epimedium* samples to the reference genes. Reads were assembled into contiguous sequences (contigs) using SPAdes v. 3.15.0 [109]. Assembled contigs

were aligned to the reference genes using Exonerate v. 2.2.0 [110].

Retrieving standard DNA barcodes

To assess the discriminatory power of standard DNA barcodes (*matK*, *rbcL*, and *trnH-psbA*) in *Epimedium*, we extracted these regions from 57 complete chloroplast genomes (27 newly sequenced and 30 publicly available; see Table 1 for GenBank accession numbers). Gene boundaries for *matK*, *rbcL*, and *trnH-psbA* were identified using Geneious v11.0.20. Extracted sequences were aligned with MAFFT v6.240 and trimmed to remove ambiguous regions [111].

Phylogenetic analyses were conducted using both maximum likelihood (ML) and Bayesian inference (BI) approaches. Single-marker datasets (*matK*, *rbcL*, *trnH-psbA*) and a concatenated dataset (combined *matK+rbcL+trnH-psbA*) were independently tested to assess resolution across methods. ML trees were reconstructed with RAxML v8 [112], while BI trees were generated using MrBayes 3.2 [113].

A species was deemed diagnosable only if all examined individuals formed a monophyletic group in topologies, with nodal support $\geq 70\%$ bootstrap (ML) and ≥ 0.95 posterior probability (BI). Taxa violating this criterion were classified as “molecularly indeterminate”.

Chloroplast genome-based analysis

For the comparative genomic analysis, one chloroplast genome from each species was chosen. These sequences were aligned using MAFFT v6.240, and then fine-tuned at the boundaries in Geneious. The comprehensive alignment matrix was visually displayed through the mVISTA v7.450 [114], with default settings and *E. acuminatum* ZY701 as the reference. We compared the characterization of IR-SC boundaries for 21 species of *Epimedium*. In addition, we also used *E. acuminatum* ZY701 as a representative of the genus *Epimedium* within the subfamily Podophylloideae, along with *Berberis aristata* (GenBank accession: MN746308), *Leontice incerta* (GenBank accession: NC043927), *Mahonia bodinieri* (GenBank accession: NC066184), *Nandina domestica* (GenBank accession: NC008336), *Plagiorhegma dubium* (GenBank accession: NC038103), *Podophyllum peltatum* (GenBank accession: NC037903), and *Vancouveria hexandra* (GenBank accession: NC042222), to conduct an IR-SC boundary analysis. Subsequently, we manually plotted the results of these analyses to visualize the data.

We conducted a genome-wide sliding window analysis on 27 *Epimedium* chloroplast genomes to evaluate nucleotide diversity (Pi values) and identify regions of high variation. Sliding window analysis was performed using DnaSP v6.12.03 [115] to assess nucleotide polymorphism and to screen hypervariable regions as DNA special

barcode candidates, with the following parameters: window length = 600, step size = 200.

We also performed a comparative analysis of simple sequence repeats (SSRs), tandem repeats, and four types of large repeats in 21 species of *Epimedium*. Microsatellites (SSRs) are identified by MISA [116], and the threshold is 10 repeat units. The threshold of SSRs is 6, 5, 5, 5 and 4 repeat units, respectively, for mononucleotide, dinucleotide, trinucleotide, tetranucleotide, pentanucleotide and hexanucleotide. Tandem repeats were identified via Tandem repeats finder [117]. Furthermore, four distinct types of large repeats were examined using the online REPuter tool [118].

The chloroplast dataset was reconstructed through maximum likelihood (ML) and Bayesian inference (BI) methods. These inferences are based on two datasets: the complete chloroplast genome and the hypervariable region. Identification criteria as above.

Single-copy nuclear gene-based analysis

We aligned single-copy nuclear gene datasets using MAFFT to find similarities and differences between sequences. Low-quality and redundant sequences were removed using the default parameters of trimAl v1.5.0 [119]. Additionally, genes present in 80% of the 22 species and longer than 600 nucleotides were selected to identify genes with sufficient coverage across the taxa. We used ML approaches for constructing phylogenetic trees from the SCNs tandem dataset. The resulting ML tree was compared with the chloroplast genome-based ML tree to assess congruence between nuclear and plastid phylogenies (Fig. 8). Identification criteria as above. Our main purpose was to only demonstrate the nuclear-cytoplasmic conflict at the species level, and the samples of each species in Fig. 8 were randomly selected.

Micro-morphological trait observation

Micro-morphological traits play a pivotal role in addressing taxonomic ambiguities in *Epimedium*, especially when molecular data exhibit incomplete lineage sorting or hybridization. Diagnostic traits encompass leaf epidermal characteristics, trichome types, pollen exine sculpturing, seed coat patterns, floral micro-morphology, and fruit/seed appendages [120–122]. Among these, leaf epidermal traits were emphasized for detailed investigation due to their year-round accessibility, suitability for non-destructive sampling, and direct relevance to traditional medicinal applications, as leaves are the primary source of bioactive compounds in this genus [123, 124]. Critically, leaf epidermal characteristics establish a critical link between practical taxonomic identification and phylogenetic frameworks, underscoring the necessity of integrating environmentally stable micro-morphological features into species delineation criteria [125].

First, the leaves on the dried specimens were rehydrated gradually in a decreasing alcohol series (Table 4). The rehydrated leaflets were then immersed in 70% alcohol and cleaned of surface impurities using an ultrasonic cleaner (Kunshan Ultrasonic Instrument Co., Ltd., China). Next, the leaflets were dehydrated in an incremental alcohol and isoamyl acetate series followed by critical point drying in CO₂ using a K850 critical point dryer (EMITECH, Ashford, UK). The leaf blades were then mounted on a column and sputter coated with gold-palladium using a JS-1600 sputter coater (HTCY, China). The materials were photographed using a Hitachi S-3400 scanning electron microscope (SEM, Hitachi, Japan) at 5 kV. Images were captured, and stomatal-related data were measured using ImageJ [126].

Statistical analyses were conducted using IBM SPSS Statistics v27.0. One-way analysis of variance (ANOVA) followed by Tukey HSD post hoc tests were applied to assess interspecific differences in stomatal traits (area, length-to-width ratio, pore area, and pore length-to-width ratio). Principal component analysis (PCA) was performed to reduce dimensionality, using a varimax rotation to extract components with eigenvalues > 1 [127]. Hierarchical clustering analysis (HCA) was conducted based on Euclidean distance, with the between-groups linkage method (UPGMA) to generate dendrograms. All micro-morphological variables were standardized (z-scores) prior to PCA and HCA to ensure equal weighting.

Abbreviations

| | |
|-------|-----------------------------|
| NGS | Next-generation sequencing |
| DGS | Deep genome skimming |
| ITS | Internal transcribed spacer |
| SCN | Single-copy nuclear gene |
| mtDNA | Mitochondrial DNA |
| nrDNA | Nuclear ribosomal DNA |
| LSC | Large single copy |
| SSC | Small single copy |
| IR | Inverted repeat |
| tRNA | Transfer RNA |
| rRNA | Ribosomal RNA |
| SSRs | Simple sequence repeats |
| ML | Maximum likelihood |
| BI | Bayesian inference |

Supplementary Information

The online version contains supplementary material available at <https://doi.org/10.1186/s12864-025-12108-5>.

Supplementary Material 1

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Authors' contributions

Y.-J.F. conducted the investigation, developed methodology, performed software work, conducted formal analysis, created visualizations, and wrote/edited the original draft. C.-G.L. and C.M. developed methodology, performed software work, and wrote the original draft. M.H. conducted formal analysis and wrote the original draft. J.-P.M. developed methodology and conducted formal analysis. M.-R.L. performed software work and conducted formal analysis. F.J. and R.G.J.H. contributed to conceptualization, methodology, supervision, validation, and manuscript review/editing. L.Z. and Q.Y. contributed to conceptualization, funding acquisition, investigation, methodology, project administration, supervision, validation, and manuscript review/editing. All authors read and approved the final manuscript.

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Data availability

Data generated or analyzed during this study are provided within the manuscript or supplementary information files. Raw Illumina sequencing reads have been deposited in the NCBI Sequence Read Archive (SRA) under BioProject accession codes PRJNA1202853 and PRJNA990516. Sequence data supporting this study are available in the GenBank database under accession numbers PV192894–PV192923. The single-copy nuclear gene sequence alignment matrices are publicly accessible via the Figshare repository at <https://doi.org/10.6084/m9.figshare.285097>.

Declarations

Ethics approval and consent to participate

This study's material collections and experimental research complied with relevant institutional, national, and international guidelines and legislation. No specific permissions or licenses were required. All voucher specimens were morphologically authenticated by Prof. Liang Zhao and Prof. Bao-lin Guo, and deposited in the Herbarium of Northwest A&F University (WUK) and the Institute of Medicinal Plant Development, Chinese Academy of Medical Sciences (IMPD) for permanent preservation.

Consent for publication

Not applicable.

Competing interests

The authors declare no competing interests.

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