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Local versus field scale soil heterogeneity characterization – a challenge for representative sampling in pollution studies

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Abstract

This study is a contribution to development of a heterogeneity characterisation facility for “next generation” sampling aimed at more realistic and controllable pesticide variability in laboratory pots in experimental environmental contaminant assessment. The role of soil heterogeneity on quantification of a set of exemplar parameters, organic matter, loss on ignition (LOI), biomass, soil microbiology, MCPA sorption and mineralization is described, including a brief background on how heterogeneity affects sampling/monitoring procedures in environmental pollutant studies. The Theory of Sampling (TOS) and variographic analysis has been applied to develop a fit-for-purpose heterogeneity characterization approach. All parameters were assessed in large-scale profile (1–100 m) vs. small-scale (0.1–1 m) replication sampling pattern. Variographic profiles of experimental analytical results concludes that it is essential to sample at locations with less than a 2.5 m distance interval to benefit from spatial auto-correlation and thereby avoid unnecessary, inflated compositional variation in experimental pots; this range is an inherent characteristic of the soil heterogeneity and will differ among soils types. This study has a significant carrying-over potential for related research areas e.g. soil science, contamination studies, and environmental monitoring and environmental chemistry.

1 Introduction

All parameters for realistic, effective integration of variability over different scales are directly related to soil heterogeneity. There is a growing need for an integrated understanding of contaminant behaviour in soil pollution studies (Arias-Estévez et al., 2008; Crespín et al., 2001; Johnsen et al., 2013; Li et al., 2006; Soniarodriguezcruz et al., 2006; Sørensen et al., 2006; Torstensson and Stark, 1975; Rasmussen et al., 2005). In this context there is a missing link in the form of soil heterogeneity and its effective characterization, a feature often overlooked. Heterogeneity characterisation is the first,

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and in some cases the most important step, in soil contaminant studies, with relationships to various other aspects of environmental research and monitoring. A result of introducing more valid soil heterogeneity characterisation will be improved soil sampling procedures (Kardanpour et al., 2014, 2015), which in turn will contribute towards improved environmental fate study reliability (Boudreault et al., 2012; Chappell and Viscarra Rossel, 2013; de Zorzi et al., 2008; Lin et al., 2013; Mulder et al., 2013; Totaro et al., 2013).

Even in simple systems, the variability and risk for misinterpretation may have strong effect on parameterisation of processes relating to compound fate studies. These latter issues are being increasingly more recognised, as is the lack of appropriate methods to ensure documented representativity of the experimental batch volumes/masses with respect to the surrounding geology and biotic/abiotic soil characteristics. There is an urgent need for scientifically based experimental approaches, scale-up procedures and attendant principles for parameterisation of variability in these types of natural systems (Kardanpour et al., 2014; Adamchuk et al., 2011; Chappell and Viscarra Rossel, 2013; de Zorzi et al., 2008).

Of particular interest will be a newly developed facility for empirical variability characterisation, which allows heterogeneity to be mapped at problem-dependent scale hierarchies. Based on this, it is possible to devise optimised sampling strategies that will allow fit-for-purpose representativity with respect to laboratory experiments depending of similar (or at least comparable) soil samples (pots). For this purpose the Theory of Sampling (TOS) delivers benchmarks measures expressing acceptable maximum heterogeneity limits and in the case of violations/transgressions furthers a complete understanding of how to identify and eliminate the detrimental sampling errors and provides tools for unambiguous mixing effectiveness. Combining these tools with specific knowledge on the relevant contaminant processes and compound properties, it will be possible to address the critical scale-dependent variability with increased confidence based on more realistic environmental parameter delineation.

This study focuses on development of the necessary heterogeneity characterisation for sampling/monitoring and multi-parameter modelling practices, allowing implementation of realistic pesticide variability in experimental environmental contaminant assessment studies. The study has a significant carrying-over potential for related research areas e.g. soil science, contamination studies, and environmental monitoring.

We here focus on characterization of soil heterogeneity in terms of soil moisture, organic matter (LOI), biomass, microbiology, MCPA sorption and mineralization. The measured parameters are here used to illustrate effective management of heterogeneity; this particular location has been studied before in its own right. Following two earlier complementary studies, the focus below is on the necessary representativity demands when facing compound fate and mineralization studies (Kardanpour et al., 2014, 2015). Field observation indicates a very well mixed sandy soil with almost no visual heterogeneity features. But the main issue is: does this apparent uniformity extend to all fate compounds? How is it possible to document that small sample masses, as typically used in pot experiments, are representative of their entire parent field, or to which sub-field scale? In other words, how can results and conclusions from laboratory experiments be reliably scaled-up and generalized to larger scales?

2 Materials and methods

2.1 Location and sampling pattern

Fladerne Bæk is situated on the Karup peri-glacial outwash plain, Jutland, Denmark (56° N, 9° E) South West of Kastrup airport. The substratum is an arable sandy soil which has been tilled and cropped for more than 100 years, mainly supporting barley and potatoes during last 10 years. Thus this is a typical “very well mixed” soil type compared to the much more heterogeneity glacial clayey soil types treated in (Kardanpour et al., 2014). Soil samples were collected from the topsoil (A-horizon); the present samples cover depth interval from 0–15 cm. The 60 m long sampling profile was roughly

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N–S. Each field sample included 200–300 g of fresh soil. At the center of this transect at point 29, seven additionally samples form a roman grid (3 × 3) replication experiment with 0.3 m equidistance.

The sampling rationale aimed at variographic fate characterization commensurate with a long profile at a scale length between 1 and 60 m; the small-scale roman square was intended as a basis for conventional statistical treatment (average and, standard deviation). This central sample layout serves as a small scale local “replication experiment” compared with the transect dimensions (Kardanpour et al., 2014). In total 64 samples were collected, 57 samples from the long profile and nine samples of the small grid (two samples identical to two from the transect), one in between and three more in each side of transect with the same distance as the first three in the center of transect. The original fresh soil was kept frozen until use.

2.2 Theory of sampling and variographic analysis

The Total Analytical Error (TAE) is most often under acceptable control in the analytical laboratory as regards to both accuracy and precision. A sampling procedure must be both *correct* (ensures accuracy) and *reproducible* (ensures precision); TOS defines *representativity* in a rigid conceptual and mathematical approach. The critical issue is always, even for TOS-compliant sampling, that analytical results are but an *estimate* of the true (average) analytical grade of the lot sampled, because the aliquot is based on only a miniscule mass (0.5–2.0 g) compared to the entire field topsoil layer it is supposed to represent (typical mass/mass sampling ratios range $1 : 10^3$ to $1 : 10^9$). The full sampling-analysis process and its characteristics is therefore the only guarantee for the relevance and reliability of the aliquot brought forth for analysis. The fundamental TOS principles need to be applied to all appropriate scales along the entire “field-to-aliquot” pathway, not only to the primary sampling, but in particular also to the successive stages of mass reduction in the laboratory before the ultimate analytical aliquot extraction. The only change in this multi-stage sampling chain is the operative scale (TOS principles and unit operations are scale-invariant). A comprehensive overview of

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all subsampling issues (laboratory mass reduction) has been published in Petersen et al. (2004), which does not include the “coning-and-quartering” approach, despite the fact that this approach has enjoyed some popularity e.g. for certain field applications to soils (Gerlach et al., 2002). However the coning-and-quartering approach has been severely criticized in the professional TOS literature, e.g. most recently in Esbensen and Wagner (2014); from a representativity point of view coning this mass reduction approach must be strongly discouraged

On the basis of a correct sampling and mass reduction regimen, it is possible to characterize the inherent auto-correlation between units of a process/lot or along 1-D profile (or transect). The *semi-variogram* (in this work referred to simply as the “variogram”) is employed to describe the variation observed between sample pairs as a function of their internal distance.

To calculate a variogram a sufficient number of units (increments/samples) are extracted equidistantly, spanning the process interval of interest, or the full profile length, as needed. The variogram is a function of a dimensionless, relative lag parameter, j , which is this distance between two units, the analytical results of which are compared. Full details of the variographic approach are described in DS3077 (2013), Esbensen et al. (2007), Esbensen et al. (2012a, b), Gy (1998), Minkkinen et al. (2012), Petersen and Esbensen (2006) and Petersen et al. (2005). Variograms may have apparent different specific appearances, but three fundamental characterizing features carry all the important information related to sampling errors and the heterogeneity along the profile in any-and-all variogram: the *sill*, the *range*, and the y axis intercept, termed the *nugget effect*. Definitions of these features are given below.

The Sill is the y axis value at which the variogram levels off and becomes horizontal. The Sill represents the total variance calculated from all experimental heterogeneity values. The sill corresponds to the overall maximum variance for the data series if/when calculated *without* taking their ordering into account.

The Range is the lag distance beyond which the variogram $\nu(j)$ levels off and reaches a stable, constant Sill. Samples taken at lags below the Range are auto-correlated to

a larger and larger degree as the lags gets smaller and smaller. The range carries critical information as to the local heterogeneity with respect to the objective of the present method development.

The Nugget Effect indicates the amount by which the variance differs from zero when a variogram is extrapolated backwards so as to correspond to what would have been a lag = 0. A lag equal to zero has no physical meaning, but it represents the hypothetical case of two samples extracted at the same time and location (indeed from exactly the same physical volume of the lot). Thus although “true replicates” from the exact same soil location (volume) are not physically possible, the nugget effect nevertheless allows to estimate the corresponding discontinuous variance difference. This can be viewed as a collapse of the 1-D sampling situation (profile, transect) to a stationary sampling situation (small lots, 2-D and 3-D lots), see DS3077 (2013) and Esbensen et al. (2007, 2012a, b) for further descriptions.

The nugget effect has a special interest, it contains *all* sampling, – sample handling/processing and analytical errors combined, which makes up the total measurement uncertainty. A variogram with a high nugget effect w.r.t. the sill signifies a measurement system not in sufficient control (DS3077, 2013; Esbensen and Wagner, 2014).

Variogram calculations are strongly influenced by *outliers* and/or *trends*. A valid variographic analysis often necessitates outlier deletion after proper recognition and description and occasionally also de-trending of the raw transects data if/when trends are dominant or severe. In this study the raw data profile was de-trended using a simple regression slope subtraction from the data set where needed.

2.3 Mass reduction/subsampling procedure

After the stored samples were thawed and accommodated for 20°C for a week, they were ready for further treatment. The primary field sample size (200–300 g) must be reduced to the analytical sample size (1–2 g), not a trivial mass-handling issue. In order to provide representative sub-samples, TOS principles were applied scrupulously to all

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mass reduction steps using the soil-adapted bed-blending/cross-cut reclaiming technique described in detail in Petersen et al. (2004). Samples were deployed in a tray, forming a 1-D lot, with 10 randomly selected transverse increments along the elongated dimension resulting in subsamples of 20–30 g each. The same procedure repeated in secondary mass reduction step ended up with the final analytical mass (2 g) for the wet samples analyses.

The remainders of the secondary sub-samples were air-dried for four days in lab temperature (20 °C), to be used in parallel sorption experiments. As a further scale-down iteration, a similar bed-blending/cross-cut reclaiming were used to provide analytical samples of 2 gram, also based on 10 increments each.

2.4 Analytical experiment methods

2.4.1 MCPA sorption

The sorption experiment started in glass vials with Teflon caps containing 1 g of the respective soils, and 9 mL of Milli-Q water. The vials were kept for 24 h and then shaken in a horizontal, angled shaker prior to addition of 1 mL ^{14}C -MCPA stock solution, with 10 000 dpm in each individual vials. Sorption experiments were performed with two initial concentrations: 1 and 100 mg MCPA L^{-1} . Sorption was determined for MCPA in all off the 64 soil samples, using ^{14}C -labeled MCPA.

After adding the stock solution, the vials were incubated in the shaker for 48 h and then placed vertically for another 48 h, all at 20 °C. Subsequently 2 mL of the solution were transferred to the 2 mL Eppendorf micro-centrifuge tubes and centrifuged at 14 500 \times g for 7 min. Radioactivity in 1.5 mL supernatant was determined using a Wallac 1409 Liquid Scintillation Counter after mixing it with 10 mL OptiPhase Hisafe3 scintillation cocktail.

2.4.2 MCPA mineralization

Mineralization experiments were carried out in 100 mL glass jar with air tight lid. Two gram soil (wet weight) was placed in small plastic vials before adding 0.5 mL of ^{14}C -labeled MCPA (5 mg MCPA kg^{-1} soil) with a radioactivity of 2000 dpm. In the glass jar a LSC vial was also placed containing 2 mL 0.2 M of NaOH as a CO_2 trap. The jars were incubated at 20°C for 14 days. Mineralization encountered as %-evolved $^{14}\text{CO}_2$ was measured at day 3, 7 and 14. The CO_2 -traps were changed and replaced with a fresh trap at each sampling date. ^{14}C in the NaOH was measured as described in the sorption experiment by Liquid Scintillation Counting.

2.4.3 Biomass; substrate induced respiration (SIR)

The same set up as used for MCPA was used for the glucose mineralization with adding 0.5 mL ^{14}C -labeled glucose with 5000 dpm to the 2 g of soil. All other set up details, equipment and experimental design were identical. Alkaline traps were replaced with fresh alkaline traps and measured after 4 and 24 h considering the rapid respiration of the glucose and ^{14}C measured as described in the sorption experiment by Liquid Scintillation Counting. Conversion into biomass were according to Dictor et al. (1998) and Tate et al. (1988).

2.4.4 Microbiology, bacteria Colony Formation Units (CFU)

A suspension was made with 2 g of soil into 200 mL sterile water and after shaking for 15 min, diluted with sterilized water ended in two different dilutions for each sample; with three and four order of magnitude To measure the soil microbiology, 1 mL of each sample were placed on a petrifilm sheet and CFU was counted after 3 and 7 days of incubation at 20°C .

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3 Result

3.1 Geochemical profiling

In order to show the natural soil heterogeneity in a comparable format, Figs. 2–5 illustrates the individual large-scale parameter profiles; concentration vs location of the samples taken from the profile in the Fladerne field. The variation of the central *small-scale* replication samples is shown as mean concentration ± 2 SD with dashed horizontal lines in the figures. The large-scale variation of the soil moisture, LOI and the biomass content (SIR) are to be compared to the small scale replication result for the same parameter in each graph, Fig. 2.

The same comparison graph illustrated for the MCPA sorption in Fig. 3 for two different initial MCPA concentrations, as it is clear, the soil sorption behavior show different variation with different concentrations. The results of the MCPA mineralization of the soil in Fig. 4 also show different variability with different mineralization steps. The profile of the MCPA mineralization is illustrated for different mineralization steps: first three days, four to seven days and eight to fourteen days. The two latter periods show rather a similar variation because these two periods are in the final part of the mineralization development, Fig. 6.

The soil microbiology ($\text{Log (CFU g soil}^{-1}\text{)}$) profile after seven days of incubation is also illustrated in Fig. 5.

3.2 Experimental variograms

Prior to variogram calculation, all parameters have been checked for outliers and trends, Figs. 2–5. Variograms have been calculated with using large scale experimental profiles without model fitting of the variogram parameters (this is common in geostatistics, but not used here as TOS' variogram approach is not used for kriging but solely for heterogeneity characterization and interpretation.

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concentrations), this issue becomes moot, as this transformation is already performing what amounts to scaling. In the present paper we therefore did not apply centering, opting for the easily interpreted and useful appearance of the average variogram shape, Fig. 8 (left).

4 Discussion

Aiming for a general approach to soil heterogeneity characterisation, a set of naturally occurring organic, anthropogenic and biota parameters were studied at scales from 1 to 60 (100) m. The first step is always inspection of the raw data set with respect to potential outliers and/or trends. In the present study the geochemical parameter profiles show no outliers and no strong trends, Figs. 2–5.

The experimental design provides comparison of the small-scale and large-scale variability. All profiles can thus be directly compared with the level and variation at the small-scale experiment, by the pertinent mean ± 2 SD.

Any short interval on a profile can be considered as a small scale study in its own right. In this context there is a clear difference between the empirical variability in different segments *along* each profile: the local variability does not necessarily extend to larger scales. This has an important practical conclusion: any local small-scale sample collection cannot be generalised to larger scales. Unwitting or un-reflected scaling-up of small scale experimental organic, anthropogenic and biota fate and mineralization results will bring an inflated uncertainty outside experimental control. The mineralisation parameters which show different variation behaviour in the different mineralisation steps send an important message regarding studies concerning time-dependent characterisations. A similar difference is observed for MCPA sorption with different concentrations, i.e. when studies are concerned with concentration-dependent phenomena.

The *general* local variability behaviour is however well captured as the below-range part of the general variogram loading spectrum for PC1. The variogram is able to generalise the common local scale behaviour. With TOS, there is synoptic information

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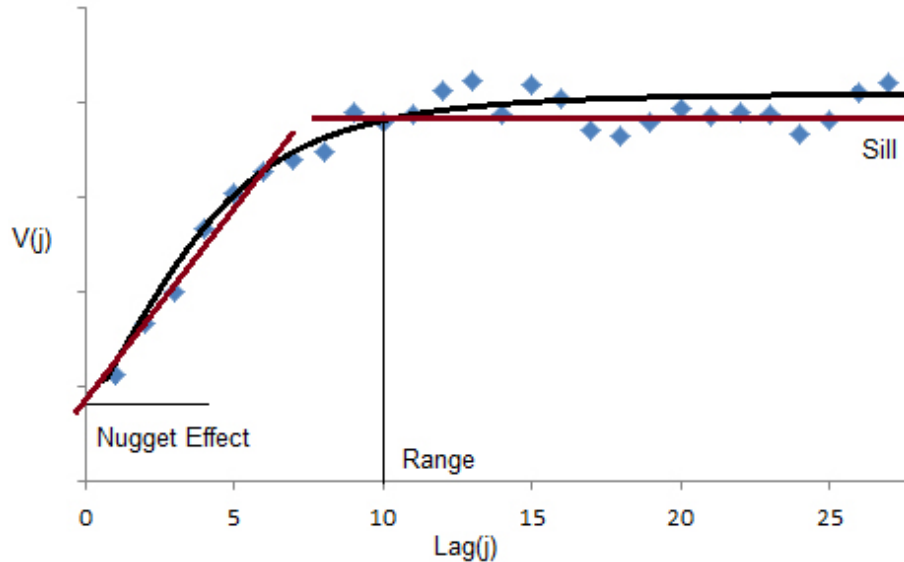


Figure 1. A generic variogram, schematically defining nugget effect, sill, and range. The illustration depicts an *increasing variogram*, which is the most often occurring type of variogram in the case of significant auto-correlation (for lags below the range) (Kardanpour et al., 2014). The nugget effect magnitude relative to the sill in this illustration is significant of an acceptable total measurement system, < 20 %.

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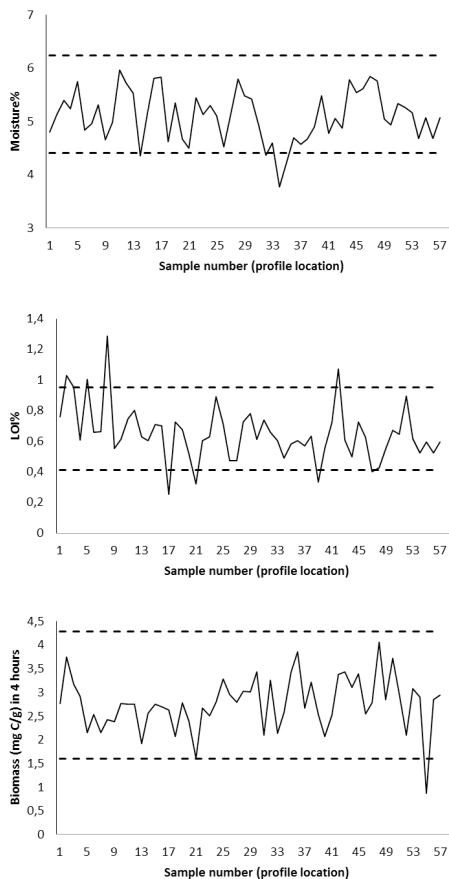


Figure 2. Fladerne Bæk, profiles of soil moisture (%), LOI (%), and biomass (mg C g^{-1}) vs. sample number (profile location). Dashed lines represent mean ± 2 SD of the small-scale replication.

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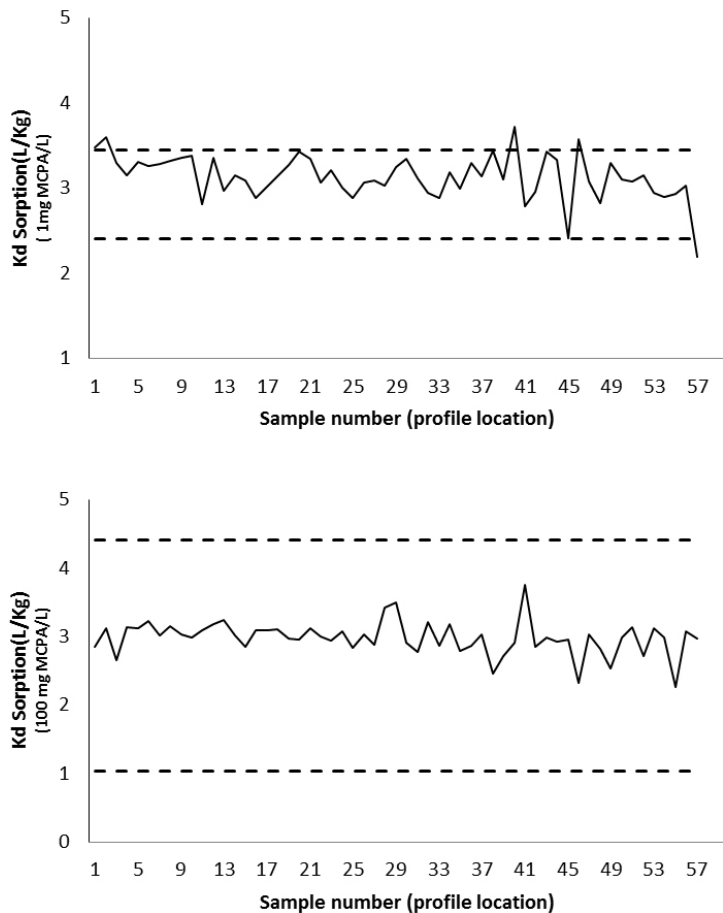


Figure 3. Fladerne Bæk, profiles of K_d MCPA sorption vs sample number (profile location), $K_{d,1}$: MCPA (1 mg L^{-1}), $K_{d,100}$: MCPA (100 mg L^{-1}). Dashed lines represent mean ± 2 SD of the small-scale replication experiment.

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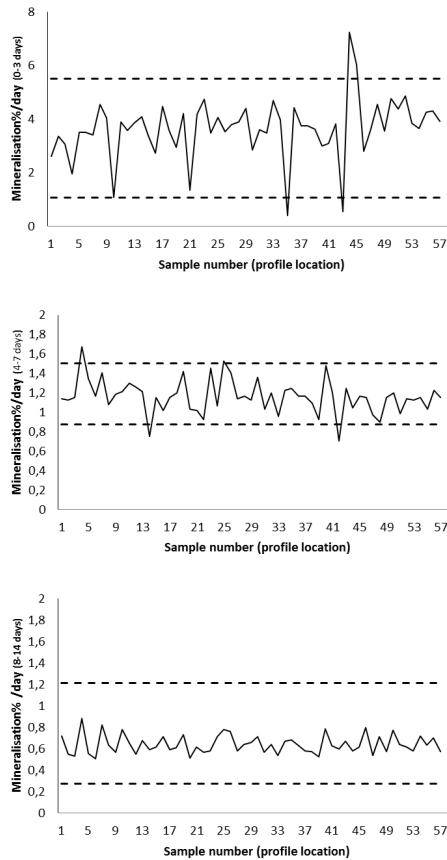


Figure 4. Fladerne Bæk, profiles of MCPA mineralization in three different periods: 0–3 days, 4–7 days, 8–14 days vs. sample number (profile location). Dashed lines represent mean ± 2 SD of the small-scale replication experiment.

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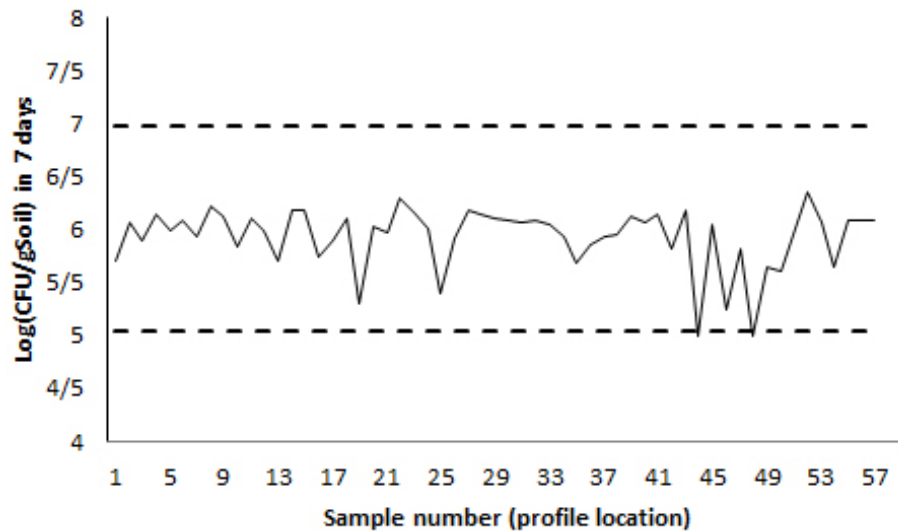


Figure 5. Fladerne Bæk, profiles of log (CFU g soil⁻¹) vs. sample number (profile location).

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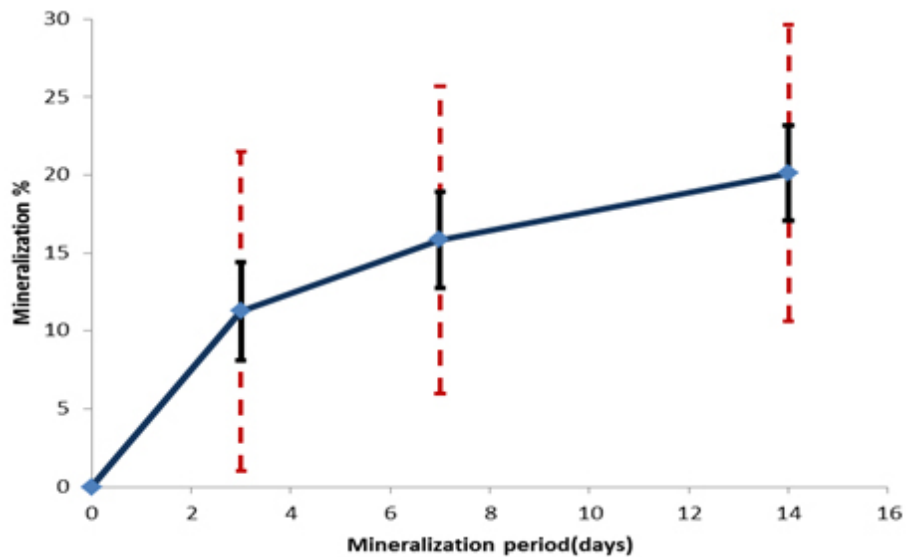


Figure 6. Average mineralisation rate for all 57 samples: error bars are based on the standard deviation (solid bars) and the range of the whole sample set (stippled bars).

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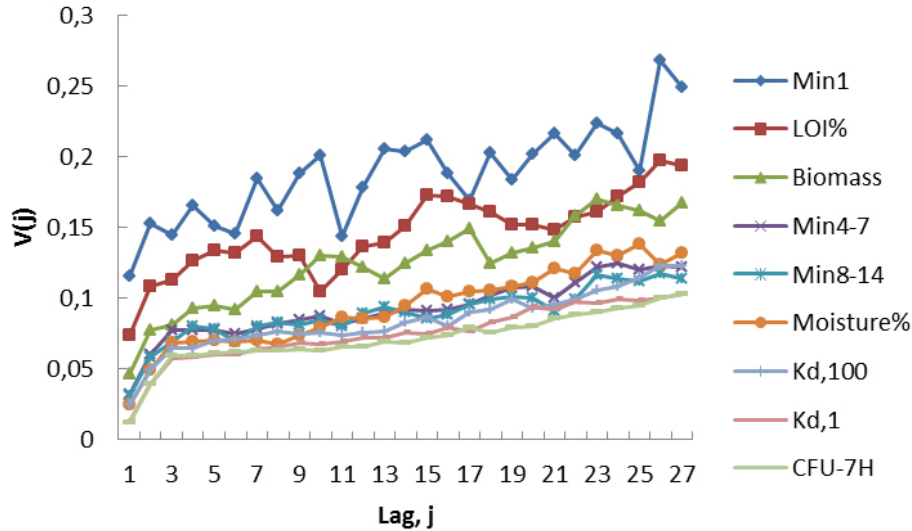


Figure 7. Synoptic variogram of all parameters in the present study comparing nugget effect, sill and range levels.

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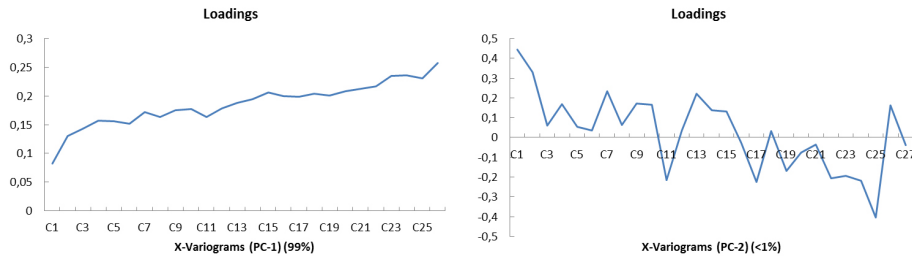


Figure 8. PCA ($X_{\text{variogram}}$) loading plot for PC-1 (left) and PC-2 (right). The $X_{\text{variogram}}$ matrix has not been subjected to pre-treatment before PCA (no centering, no scaling). The range of the average variogram shape as represented by the PC1 loadings is ca. 5 m.

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