Study Visit to Mexico: The IOS Pre-Conference Tour and 11th International Oak Society Conference

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I would like to express my sincere thanks to the organisations that made this study visit possible. Support from the Merlin Trust, the Kenneth Black Bursary Scheme of the Hardy Plant Society, and the RHS enabled me to take part in an experience that has been both professionally valuable and personally meaningful. I am also grateful to the International Oak Society for organising such a well-considered programme and for fostering a welcoming, supportive community. Opportunities like this are rare, and it is through the generosity and continued commitment of these societies that people can learn, connect, and carry these experiences forward into their work.

Introduction

This report documents a study visit to Mexico undertaken in autumn 2025, combining a seven-day pre-conference field tour through central Mexico with attendance at the 11th International Oak Society (IOS) Conference, held in Oaxaca. The project was supported by the Merlin Trust, the Kenneth Black Bursary Scheme of the Hardy Plant Society and the Royal Horticultural Society. The trip was aimed at deepening my understanding of the genus *Quercus*, by observing them growing in their native environments and engaging directly with the international oak research and conservation community.

Mexico represents the global centre of diversity for the genus *Quercus*. Of the approximately 430 oak species recognised worldwide, around 170 occur in Mexico, occupying an extraordinary range of habitats. For someone working professionally with cultivated trees, and oaks in particular, this makes Mexico one of the most important places in the world to study the genus in context. The opportunity to move through multiple ecological regions and then reflect on those observations within a scientific and conservation framework at the conference made this project especially valuable.

Background and Purpose of the Visit

My role as an Arboricultural Supervisor at the Royal Botanic Gardens, Kew involves the care, management, and long term planning of trees within a public garden and arboretum. This includes contributing to decisions around species selection, establishment, and resilience under climate change, as well as mentoring apprentices and early career staff. Many of the trees I work with originate from regions very different from the UK, and understanding how they grow, regenerate, and interact with their environment in the wild is essential for managing them effectively in cultivation.

I first attended an International Oak Society conference in 2018, which played a formative role in shaping my interest in oaks and their conservation. Since then, I have felt a strong urge to remain connected to this community, not simply because of a shared interest in oaks, but because the relationships formed through that common focus developed into lasting professional friendships. Returning to the Society several years later, with greater experience and responsibility, provided an opportunity to revisit those early influences with a more informed and reflective perspective.

The Pre-Conference Tour

The pre-conference tour formed the foundation of the field-based learning. Over the course of a week, we travelled across central Mexico, moving through a sequence of landscapes that illustrated the extraordinary ecological breadth of Mexican oak habitats. This progression from dry upland forests to humid cloud forests was one of the most valuable aspects of the entire project.


Figure 1- Quercus purhepecha

The tour began around Morelia, in Michoacán. One of the most striking early encounters was with *Quercus purhepecha*, a recently described shrubby oak with a very restricted distribution. Encountering a species so new to science immediately highlighted how dynamic oak taxonomy remains in Mexico and reinforced the importance of continued field study. This was a stark contrast to the towering oaks I work with at home, some individuals barely reached the height of my knee and served as a strong reminder of just how diverse the genus can be. A well-deserved congratulations was shared with the team involved in locating, studying, and formally describing this species.

Further along at the next stop, we entered a denser forest where more widespread species such as *Quercus crassifolia*, *Q. resinosa*, and *Q. scytophylla* were present. Seeing these trees growing together under natural conditions brought a new level of clarity to differences in leaf texture, growth habit, and overall form—details that often remain ambiguous when trees are encountered individually in cultivation. Walking among them, and discussing their variation with others in the group, helped me to slow down and really observe. It reinforced the value of context in identification and deepened my ecological understanding in a way that will directly influence how I interpret and work with these species back at Kew.


Figure 2 - Quercus resinosa

Moving north into Guanajuato, the landscape became drier and more open, with oak woodlands growing at around 2,400 metres on limestone and volcanic substrates. Species such as *Quercus castanea*, *Q. rugosa*, and *Q. jonesii* showed clear adaptations to drought and exposure, including compact form and tough, leathery leaves. A particularly useful identification feature highlighted to the group was the deep purple colouring of the inner acorn of *Q. rugosa*, a detail that proved memorable and surprisingly diagnostic.

Figure 3 - Q. Rugosa acorns

A particularly instructive aspect of this region was learning about traditional woodland use, including charcoal production from oak stands. Rather than representing indiscriminate exploitation, this practice has historically involved long rotational cycles that allow woodland regeneration. Seeing this challenged some of my preconceptions around conservation and reinforced the idea that sustainable use and ecological health can coexist.

Figure 4 - Charcoal production

As the tour moved east into Puebla, increased humidity brought a marked transition in vegetation. Cloud forest environments supported oaks with much larger leaves and more luxuriant growth, including *Quercus lancifolia* and *Q. sartorii*. Visits to botanic gardens and surrounding forests highlighted both the richness of these habitats and their vulnerability.

One particularly memorable observation was of *Quercus hirtifolia*, a cloud forest species of conservation concern, with acorns already germinating on the tree. This vivid example of regeneration illustrated how closely some oak species are tied to specific climatic conditions and how sensitive they may be to environmental change.

Figure 5 - Q. hirtifolia

Figure 6 - Q. insignis

In Veracruz, near Xalapa and Huatusco, forests became cooler, wetter, and more enclosed. At cloud forest sites such as the Santuario del Bosque de Niebla and Las Cañadas, species including *Quercus xalapensis*, *Q. germana*, *Q. pinnativenulosa*, and *Q. paxtalensis* formed dense canopies rich in epiphytes and associated understory plants.

The tour culminated with *Quercus insignis*, notable for producing the largest acorns of any oak species. Encountering these trees in a regenerated forest on land previously used for cattle grazing was a powerful demonstration of ecological recovery and long-term thinking in land management.

The IOS 11th Conference

Arriving in Oaxaca for the conference marked a shift from field immersion to reflection and exchange. The conference brought together enthusiasts, researchers, arborists, and conservation practitioners from across the globe, united by a shared interest in oaks. Sessions explored oak evolution, taxonomy, genomics, conservation, and restoration, providing valuable context for the observations made during the pre-conference tour.

Figure 7 - Conference banner

Returning to the International Oak Society after first attending a conference in 2018 was deeply meaningful. Reconnecting with colleagues and friends from that earlier meeting highlighted how bonds formed through shared interests can develop into lasting friendships. Meeting again in the centre of diversity for the genus *Quercus* felt particularly significant and reaffirmed my sense of belonging within this community.

The wealth of knowledge shared at the conference was impressive, and the fact that so many participants had travelled great distances to contribute and exchange ideas was genuinely inspiring. Informal conversations between sessions were as valuable as the formal programme, reinforcing the importance of collaboration and long-term engagement in conservation.

El Árbol del Tule

During our time in Oaxaca, we visited the Arbol del Tule, an ancient Montezuma cypress (*Taxodium mucronatum*) growing in the town of Santa María del Tule. Although not an oak, standing beneath this extraordinary tree was one of the most grounding moments of the entire trip. Its immense trunk and great age offered a powerful sense of perspective, reminding me of the timescales on which trees truly exist.

After days immersed in oak diversity, taxonomy, and conservation, the Árbol del Tule quietly reinforced a simpler message that individual trees can hold profound cultural and emotional significance. Much like the oaks we encountered throughout the tour, this tree is deeply woven into the identity of the local community and cared for as a shared responsibility. Seeing that relationship firsthand echoed many of the themes explored during the conference of stewardship, continuity, and the role of people in sustaining trees across generations.

For me, this visit served as a moment of stillness within a busy programme, linking technical learning with something more personal and enduring. It reinforced why I work with trees and why understanding their cultural as well as ecological value is so important.

Figure 8 - Arbor Del Tule

Key Messages and Learning

Several key messages emerged clearly from this project. The first was the importance of seeing plants in their native environments. Field observation revealed ecological relationships and growth patterns that cannot be fully understood from cultivated specimens alone.

A second key message was the role of people in sustaining plant diversity. Many oak landscapes visited persist not despite human involvement, but because of it. Meeting land custodians, hearing their stories of conservation, and seeing the results of their work demonstrated the power of local influence in ecology.

Finally, the visit reinforced the importance of long-term engagement with landscapes, with plants, and with professional communities. Returning to the IOS after several years underscored the value of maintaining connections over time and continuing to learn from shared experience.

Conclusion

This study visit has already influenced my work at the Royal Botanic Gardens, Kew. Field observations have informed my understanding of species selection and management under changing climatic conditions, while the broader ecological perspective gained has enriched how I interpret trees to colleagues, apprentices, and visitors.

Equally important has been the personal impact of the trip. These opportunities help develop me on both a professional and personal level, shaping how I approach my work and reaffirming my commitment to long-term stewardship.

This study visit to Mexico was both professionally enriching and personally rewarding. It fulfilled the aims set out and exceeded my expectations in terms of learning, inspiration, and connection. I am extremely grateful to the Merlin Trust, the Kenneth Black Bursary Scheme, and the RHS for making this opportunity possible.

The knowledge gained, friendships renewed, and new connections formed will continue to inform my work at the Royal Botanic Gardens, Kew and support my long-term development within horticulture and arboriculture. Above all, the visit reinforced why seeing plants in their native landscapes and engaging with the communities who care for them remains one of the most powerful tools for learning, understanding, and responsible stewardship

Figure 9 - Pre-conference group