

**Hemlock Woolly Adelgid**  
***Adelges tsugae* Annand**

Detection Survey Protocol

## 1. Background and Objectives

The hemlock woolly adelgid (HWA), *Adelges tsugae* Annand is a destructive pest of susceptible species of hemlock, *Tsuga* spp. and is native to India, Japan, Taiwan, and China. In 1919, HWA was first reported in North America in British Columbia and can now be found in Alaska, Washington, Oregon, Idaho, Montana and California occurring on both western, *T. heterophylla* (Raf.) Sarg. and mountain hemlock, *T. mertensiana* (Bong.). Damage on these two species is usually minor. HWA was first detected in the eastern United States in Virginia in 1951. Since this time it has steadily spread and is now reported from 21 states, where it has resulted in significant mortality of both eastern, *Tsuga canadensis* (L.) Carr. and Carolina, *Tsuga caroliniana* hemlocks. HWA threatens the existence of these two species in many locations.

This survey supports plant health policy directive D-07-05, *Phytosanitary requirements to prevent the introduction and spread of the hemlock woolly adelgid (Adelges tsugae Annand) from the United States and within Canada*. This visual survey is aimed at early detection of the pest in areas where it is not known to be established.

## 2. Target Life Stages

### **HWA nymphs, adults, and white egg sacs through visual surveys.**

HWA has a complex life cycle with two successful generations per year in North America (in its native range a third generation attacks spruce). From March through May, the immobile female adelgid (sisten) lays a single white cottony egg sac that contains up to 300 eggs. These egg sacs are deposited on the twigs and branches and can remain on the tree for up to a year. Upon hatching, the nymphs (two types - progredien & sexuparae) crawl in search of a suitable site to settle, usually at the base of a needle where they remain, feed, and develop. The nymphs insert feeding stylets into plant tissue on the underside of the base of the hemlock needle and quickly develop through four instars.

In June and July, the progrediens that are now mature adelgids lay a 2<sup>nd</sup> generation of white cottony egg sacs on the branches of host trees. Upon hatching, the newly emerged nymphs (sistens), crawl to the base of host needles, feed for a short period and enter a period of inactivity called aestivation from July until October. In October, the young sistens become active, feeding upon the host throughout winter and develop into adults in spring.

Adelgid feeding at the base of hemlock needles causes needle desiccation (removal of moisture) and the tree tends to take on a grey cast. The resulting needle loss prevents the trees from producing new apical buds and can kill a tree in as little as 4 years. In North America, the sexupara group of adelgids that develop in the spring on hemlock can fly and leave host trees in June in search of a spruce (*Picea* spp.) host. These adelgids have not been successful in attacking the spruce species occurring in North America and die without reproducing.

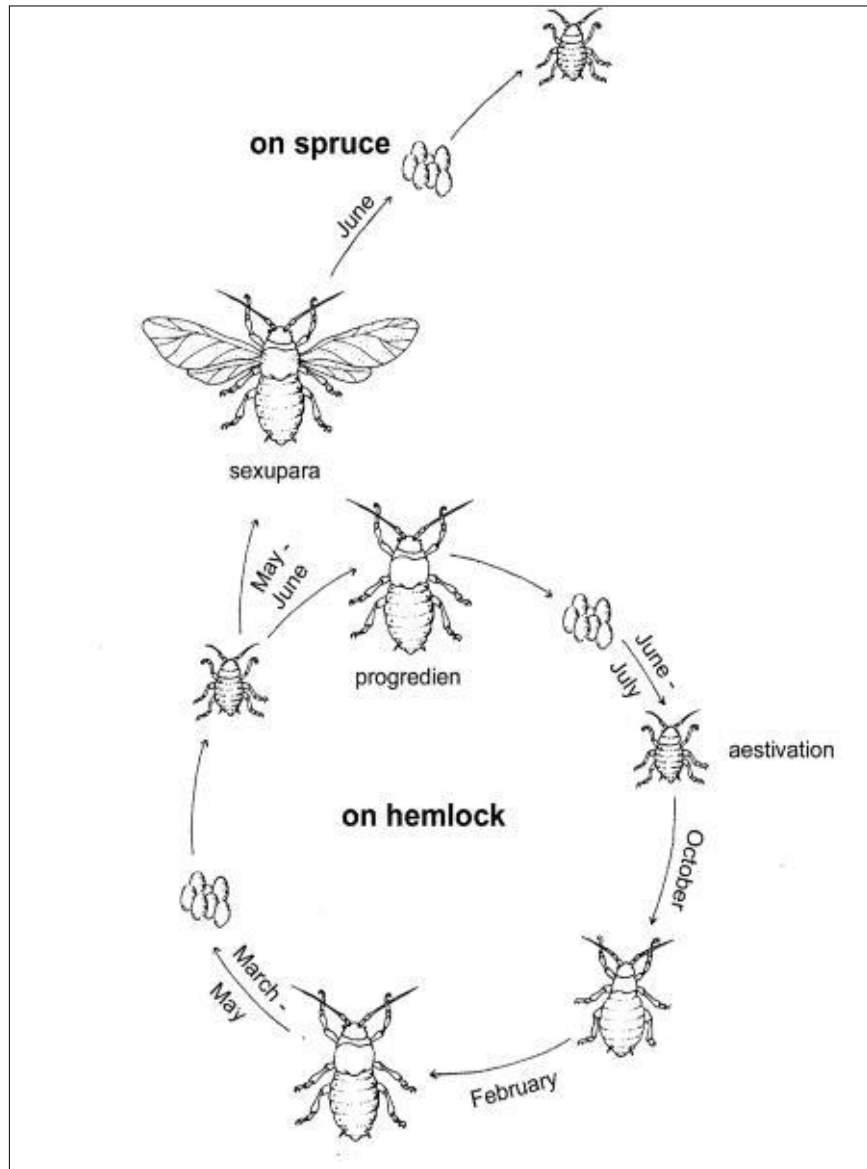


Figure 1. Lifecycle of hemlock woolly adelgid (adapted from Horn 1978).

### 3. Target Hosts

All species of hemlock (*Tsuga* spp.)

### 4. Timing and Duration

Biologically, the optimal survey period is from March to May, within an overall survey period running from November to June. **Plan to complete this survey in April and May.**

Visual surveys for HWA are best conducted when obvious woolly masses are present. Although egg sacs can remain on a host tree for up to a year, searching in the summer is not recommended as only remnants of the previous generation's egg masses may be present. If surveys fall outside the recommended time, a hand lense must be used to closely examine shoots for signs of aestivating sistens in summer and fall.

Avoid surveying when snow may be present on the branches of host trees.

### 5. Target Areas and Site Selection

Given the known distribution of HWA, the primary means by which the pest could be introduced into non-infested areas of Canada is through the movement of infested nursery stock and natural spread by wind, birds, and small mammals. The overall rate of spread has been estimated to be 20-30 km per year in the US.

|                      |               |                |                |
|----------------------|---------------|----------------|----------------|
| Alabama              | Idaho         | New Hampshire  | Rhode Island   |
| Alaska               | Kentucky      | New Jersey     | South Carolina |
| California           | Maine         | New York       | Tennessee      |
| Connecticut          | Maryland      | North Carolina | Vermont        |
| Delaware             | Massachusetts | Ohio           | Virginia       |
| District of Columbia | Michigan      | Oregon         | Washington     |
| Georgia              | Montana       | Pennsylvania   | West Virginia  |

**Table 1.** List of US states with known hemlock woolly adelgid infestations.

#### Urban Parks, Green Spaces, and Hemlock Forest Stands

The sole requirement when selecting sites for this survey is the presence of hemlock trees. However, stands of at least 4 hectares and a strong hemlock component are desired. Suitable sites can include natural areas, wooded parks, green belts, and riparian zones. Wind patterns and migratory routes of birds should be considered in site selection as

these both contribute to the spread of HWA. Hemlock forest stands within 100 km of the Canada/US Border should be given priority over other wild sites.



**Figure 2. Individual woolly mass on hemlock twig. (Photo D. Holden)**

The following survey techniques include excerpts and adaptations from the USDA Forest Service publication *Standardizing Sampling for Detection and Monitoring of Hemlock Woolly Adelgid in Eastern Hemlock Forests* (Scott Costa & Bradley Onken, 2006).

Prior to beginning any type of survey, it is important for surveyors to refresh their search image for the most common signs and symptoms of HWA as it may appear in field.

Surveyors should develop a search image for individual or small clusters of woolly masses (Fig. 2) instead of the massive infestations in typical photographs found in many publications.

### **5.1. Examining the Tree**

- Trees are selected simply on the basis of having branches within reach without using a ladder or pole pruner.
- Select a branch with green foliage (needles)
- Scan the underside of that branch for any evidence of ovisacs, focusing your examination along the stem on the outer 1 m of the branch
- If no woolly masses are found on the first branch, a second branch on the opposite side of the tree is examined.
- Examine the lower portion of the bole for woolly masses or evidence of HWA before proceeding to the next tree.

- While walking between selected trees, look on the ground for hemlock branches that may have broken off from the crown of trees. All shoots should be examined for signs and symptoms of HWA.

## 5.2. Signs and Symptoms of Attack

### 6.2.1 Signs of HWA

**Ovisacs:** The white cottony egg sac is the most obvious stage to detect and can remain on the branches, stems and twigs for up to a year (unless they are rubbed or blown off). Ovisacs occur at the base of the needles and resemble the tips of cotton swabs (Fig. 2). Look along the underside of the terminal and lateral shoots of hemlock branches.

**Nymphs and Adults:** Nymphs (crawling and sessile) and adults of the hemlock woolly adelgid are very small and difficult to detect. Sessile nymphs are an elongate oval shape, flat, black and might have a slight white fringe around the edges of their bodies. Use a hand lens to view potential specimens.

### 6.2.2 Symptoms of HWA

**Twig Dieback as well as Discoloring of Hemlock Needles:** Feeding by HWA results in twig dieback and causes needles to lose their typically green colour. In advanced stages of the infestation, swollen growths (gouting) occur at the tips of twigs and there is no new formation of branches or twigs. The crown of heavily attacked trees changes in colour from dark to yellowish-green-grey and becomes transparent from needle loss.

### 6.2.3 Non-HWA Signs and Symptoms

The white woolly masses surrounding each insect are almost invariably located at the base of the hemlock needles. To the untrained observer, other things such as spittle bugs, caterpillar and spider webbing, scale insects, and even sap dripping from pine trees might be mistaken for the adelgid. However, these can be readily distinguished because of their appearance, physical location, or both. Any specimens with questionable features should be bagged and later examined with a microscope or submitted to the CFIA for lab for analysis.

## 5.3. Survey Methodology

### 5.3.1. Methodology: Urban Parks, Green Spaces, and Hemlock Forest Stands < 3 ha

For small urban parks and greens spaces, inspect all hemlock, to a maximum of 40 trees, or 2 hours per site.

If HWA signs and symptoms are observed, complete the Suspect Site Form (Appendix I) recording the GPS reading for suspect trees and contact your local CFIA office when the suspect tree is outside an area known to be infested with HWA. .

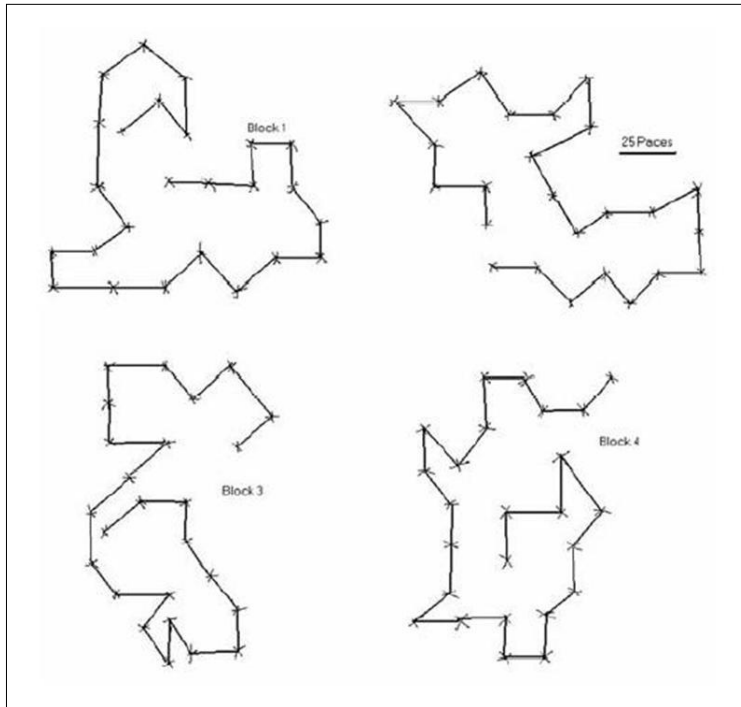
#### 6.2.4 Methodology: Urban Parks, Green Spaces, and Hemlock Forest Stands > 3 ha

- The objective is to ensure that the trees that are examined are well distributed in the block or stand.
- In cases where the hemlocks follow a stream or riparian zone, one can select a path that follows the contour of the waterbody.

Research has shown that HWA populations have a clumped distribution, as many insects do. This means that infested trees tend to be relatively close together in patches that extend across the forest stand or landscape. As more trees in the stand become infested the clumping diminishes. For the surveyor, this clumping tendency requires that the survey broadly covers the landscape to increase the chance of encountering an infested patch of hemlock trees. This is particularly important when attempting to detect low-level populations. Early infestations are often detected near roadsides or other travel corridors on individual or clumps of trees. An approach that includes both the edges and interior of stands is recommended.

Further research has shown that if no adelgids (woolly masses) are found after sampling 100 trees in a hemlock stand (as outlined below) then one can state with 75% reliability that the population of infested trees is less than 2 percent in that area.

- Select a target hemlock stand located within 100 km of the Canada US Border
- Draw a quick sketch of the site to help you plan your survey approach
- Obtain a general estimate of the size of the stand. Larger stands can be broken down into blocks that are easier to manage (Fig. 3).
- Record a general assessment of the overall health of the stand. Trees showing decline near the edge of the stand should be examined first.
- Obtain and record a GPS reading for your starting point
- Examine the first tree (see 6.2) for HWA. Take 25 paces (2 steps per pace) along the planned general direction.
- After completing the 25 paces, examine the nearest suitable tree.
- Continue this process using a zig-zagging pattern (Figure 3) until about 100 trees (25 per block) have been examined. Consider the contour of the targeted stand such that your pattern maximizes coverage.
- If HWA signs and symptoms are observed, complete the Suspect Site Form (Appendix I), record GPS reading for all suspect trees and contact the CFIA to coordinate a follow-up visit



**Figure 3.** Example of zig-zagging pattern for use in larger hemlock parks, greenspaces, and stands that have been divided into four blocks.

## 6. Biosecurity Precautions

When visiting areas that are or could be infested with pests of significance, necessary precautions must be taken to ensure that the risk of spread is mitigated.

## 7. Sample Handling and Laboratory Submission

### 8.1 Sampling Procedures

In the event that HWA signs are encountered during the survey, samples should be taken and prepared for submission to the CFIA lab in collaboration with CFIA inspection staff. A digital photograph of the egg sac or symptom should be taken. This should be emailed to your local CFIA office or the Area Survey Biologist [Surveillance@inspection.gc.ca](mailto:Surveillance@inspection.gc.ca). Suspect twigs or branches are to be clipped at least 15 cm below the egg sac using pruning shears and placed in a plastic bag containing a piece of dry paper towel. Record the GPS coordinates in Latitude and Longitude in decimal degrees (NAD 83 datum) for the tree sampled, your name, comments about the site (estimated diameter of tree, health, etc.), the date, and other location information on a piece of paper and place this into the bag. A piece of flagging tape should be placed on the tree sampled as you will likely need to revisit the tree if the sample is positive.



## 8.2 Collaborative Data Management

Survey activities conducted for a regulated pest in accordance with the established CFIA survey protocol should be captured so that all collaborative efforts can be captured.

An Excel spreadsheet containing latitude and longitude coordinates and address for the site surveyed, percent hemlock, organization details and coordinates for any suspect trees can be submitted to the CFIA [Surveillance@inspection.gc.ca](mailto:Surveillance@inspection.gc.ca) by no later than September 1<sup>st</sup> each year so that all efforts can be mapped and reported Nationally. Possible suspects should always be reported in real time.

## 9. Supplies

- Knife
- Hand lens
- Digital camera
- Tree identification guide
- Pruning shears
- Re-sealable bags
- HB pencils
- Permanent markers
- Paper labels
- GPS unit & Compass
- Maps (including forest cover or municipal forest inventory)
- Field book with waterproof paper
- Flagging tape
- Blank LSTS Report for Submission forms
- Measuring tape
- Protective footwear (Safety boots)
- Reflective vest
- Sunglasses
- Hat
- Sunscreen

## 10. Supporting Documents and Additional Information

Pest Fact Sheet for *Adelges tsugae*, Hemlock Woolly Adelgid

Hemlock Woolly Adelgid Credit Card

*Standardizing Sampling for detection and Monitoring of Hemlock Woolly Adelgid in Eastern Hemlock Forests* (Scott Costa & Bradley Onken, 2006)

<http://www.fs.fed.us/foresthealth/technology/pdfs/HWASampling.pdf>

# Appendix 1: Suspect Site Form

## HEMLOCK WOOLLY ADELGID SURVEY SITE FORM

|   |      |        |   |   |  |   |   |      |              |   |             |
|---|------|--------|---|---|--|---|---|------|--------------|---|-------------|
| Date of Survey  | Y    | Y      | Y | Y | M  | M | D | D    | Surveyor(s): |   |             |
| Datum   |      |        |   |   | N  | A | D | 8    | 3            | Site Type:<br><input type="checkbox"/> Nursery<br><input type="checkbox"/> Urban Park or Green Space<br><input type="checkbox"/> Urban Residential<br><input type="checkbox"/> Forest Stand   |             |
| Latitude  |      |        |   | . |  |   |   |      |              |   |             |
| Longitude   | -    |        |   | . |  |   |   |      |              |   |             |
| Site Name   | ATS- |        |   |   | Size of site (Ha.):  |   |   |      |              |   |             |
| Site Address: _____   |      |        |   |   |  |   |   |      |              |   |             |
|   |      | Number |   |   | Street Name  |   |   | City |              | Province  | Postal Code |
| Notes:  |      |        |   |   | Contact name:  |   |   |      |              |   |             |
|   |      |        |   |   | Contact number:  |   |   |      |              |   |             |
|   |      |        |   |   | E-mail (if applicable):  |   |   |      |              |   |             |
| <b>SUSPECT TREE DETAILS</b>   |      |        |   |   |  |   |   |      |              |   |             |
| Datum   |      |        |   |   | N  | A | D | 8    | 3            | Signs & Symptoms Present:<br><input type="checkbox"/> Woolly masses <input type="checkbox"/> Crawlers<br><input type="checkbox"/> Twig Dieback <input type="checkbox"/> Thinning crowns<br>Infestation Rating <input type="checkbox"/> Light <input type="checkbox"/> Moderate <input type="checkbox"/> Heavy |             |
| Latitude  |      |        |   | . |  |   |   |      |              |   |             |
| Longitude   | -    |        |   | . |  |   |   |      |              |   |             |
| Samples collected? <input type="checkbox"/> Yes <input type="checkbox"/> No |      |        |   |   | Pictures Taken? <input type="checkbox"/> Yes <input type="checkbox"/> No |   |   |      |              |   |             |
| LSTS System ID #:   |      |        |   |   |  |   |   |      |              |   |             |
| Notes:  |      |        |   |   |  |   |   |      |              |   |             |
| Stand Info (dead, declining trees, dbh, age, overall health, etc...):       |      |        |   |   |  |   |   |      |              |   |             |

## Appendix 2: CFIA Offices

### ATLANTIC AREA

1081 Main St  
PO Box 6088  
**Moncton, NB**  
E1C 8R2  
Tel: 506-851-7400  
Fax: 506-851-2689

**New Brunswick**  
500 Beaverbrook Court  
Suite 430  
**Fredericton, NB**  
E3B 5X4  
Tel: 506-452-4963  
Fax: 506-451-2562

**Newfoundland and Labrador**  
10 Barter's Hill  
**St. John's, NL**  
A1C 5X1  
Tel: 709-772-4424  
Fax: 709-772-2282

**Nova Scotia**  
1992 Agency Drive  
**Dartmouth, NS**  
B3B 1Y9  
Tel: 902-536-1091  
Fax: 902-536-1098

**Prince Edward Island**  
690 University Ave  
**Charlottetown, PEI**  
C1E 1E3  
Tel: 902-566-7290  
Fax: 902-566-7334

### ONTARIO AREA

174 Stone Rd W  
**Guelph, ON**  
N1G 4S9  
Tel: 226-217-8300  
Fax: 226-217-8494

**Central**  
709 Main Street West  
Floor 1, Room 101  
**Hamilton, ON**

L8S 1A2  
Tel: 905-572-2201  
Fax: 905-572-2197

**Toronto**  
1124 Finch Avenue W,  
Toronto, ON  
M3J 2E2  
Tel: 647-790-1100  
Fax: 647-790-1104

**Southwest**  
1200 Commissioners Rd  
E, Unit 19  
London, ON  
N5Z 4R3  
Tel: 519-691-1300  
Fax: 519-691-1314

**North East**  
345 College Street E  
**Belleville, ON**  
K8N 5S7  
Tel: 613-969-3332  
Fax: 613-969-3721

500 Huronia Road  
Suite 103  
**Barrie, ON**  
L4N 8X3  
Tel: 705-739-0008  
Fax: 705-739-0405

19 Ontario Rd.  
**Walkerton, ON**  
N0G 2V0  
Tel: 519-881-2431  
Fax: 519-881-3455

107 Shirreff Ave  
**North Bay, ON**  
P1B 7K8  
Tel: 705-495-5995  
Fax: 705-495-5998

Unit 7 – 38 Auriga Dr.  
**Ottawa, ON**  
K2E 8A5  
Tel: 613-773-8613  
Fax: 613-773-8672

163 Simcoe St.  
**Peterborough, ON,**  
K9H 2H6  
Tel: 705-742-6917  
Fax: 705-742-8676

60 Van Edward Dr.  
**Port Perry, ON**  
L9L 1G3  
Tel: 905-985-1870  
Fax: 905-985-8915

1219 Queen Street East  
**Sault Ste Marie, ON**  
P6A 2E5  
Tel: 705-941-2094  
Fax: 705-941-2101

977 Alloy Drive  
**Thunder Bay, ON**  
P7B 5Z8  
Tel: 807-683-4370  
Fax: 807-683-4383

### QUEBEC AREA

Room 671 – 2001  
Robert-Bourassa  
Boulevard.  
**Montreal, QC**  
H3A 3N2  
Tel: 514-283-8888  
Fax: 514-493-6154

Place Iberville IV  
2954, Laurier Blvd,  
**Ste-Foy, QC**  
G1V 5C7  
Tel: 418-648-7373  
Fax: 418-648-4792

Pièce 4500  
3225 avenue Cusson  
**ST-Hyacinthe, QC**  
J2S 0H7  
Tel: 450-768-1500  
Fax: 450-768-1474

### WESTERN AREA

8403 Coronet Road NW  
**Edmonton, AB**  
T6E 4N7  
Tel: 780-395-6759  
Fax: 780-395-6794

110 Country Hills  
Landing NW  
Floor 1, Room 102  
**Calgary, AB**  
T3K 5P3  
Tel: 587-230-2485  
Fax: 587-230-2451

4321 Still Creek Dr.,  
Suite 400  
**Burnaby, BC**

V5C 6S7  
Tel: 604-292-5785  
Fax: (604) 292-5603

269 Main St. Room 613  
**Winnipeg, MB**  
R3C 1B2  
Tel: 204-259-1370  
Fax: 204-259-1331

1800 11th Avenue  
Room 301  
**Regina, SK**  
S4P 4E3  
Tel: 306-780-7122  
Fax: 306-780-5177

4475 Viewmont Avenue  
Floor 1, Room 103  
**Victoria, BC**  
V8Z 6L8  
Tel: 250-363-3454  
Fax: 250-363-0144

1853 Bredin Road  
**Kelowna, BC**  
V1Y 7S9  
Tel: 250-470-5176  
Fax: 250-470-4899

3605 14<sup>th</sup> Avenue North  
**Lethbridge, AB**  
T1H 6P7  
Tel: 403-382-3079  
Fax: 403-382-3148

421 Downey Road  
Room 201  
**Saskatoon, SK**  
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Tel: 306-975-4904  
Fax: 306-975-4942

