For the Benefit of Farmers

Localization Fully Established in Thailand
Start-to-Finish “Localization” to Offer Thoroughgoing Support for Thai Farmers

The Kingdom of Thailand, commonly known simply as Thailand, occupies a very high place in the global rankings for rice production and export. The production of rice and other agricultural products was once the centerpiece of Thai industry, but rapid economic growth in the 1980s and 1990s changed the nation’s status from a relatively undeveloped, low-income country to a newly industrializing country committed to the export of industrial products. Despite a temporary recession set off in 1997, when the country became the epicenter of the East Asian currency crisis, the Thai economy has steadily recovered and is now firmly on a growth trajectory.

Having extended a generous welcome to foreign-affiliated companies and direct investments from Japan and Western countries, Thailand has transformed itself into a fully-fledged industrialized nation, and is increasingly seen as a leading power among ASEAN countries. In 2010, its gross national income (GNI) per capita was US$4,150 (about 1/10 of the same figure for Japan), which makes Thailand an “upper-middle-income country” (UMC) as defined by the World Bank.

Having established a presence there early on, Kubota has virtually led the mechanization of farming in Thailand and has come to enjoy the leading share in the national farm machinery market. With the opening of an engine manufacturing company there in 2012, Kubota completed the start-to-finish localization of the entire process from production of engines, a core component, to final assembly of farm machinery. What does this mean for agriculture in Thailand and the people who are engaged in farming there? The second feature of this issue examines the present state of agriculture in Thailand, the challenges it faces, and Kubota’s efforts to achieve solutions.

*1 The World Bank
*2 The World Bank classifies countries with per-capita GNI of US$3,466 to US$10,725 as UMCs.
Farming in Thailand—Underpinning the Nation’s Economy and Livelihood: To Bring “True Happiness” to Farmers

The land area of Thailand is 51.31 million ha, making it 1.4 times larger than Japan. Farmland accounts for 38.6% of the total area, or 19.80 million ha. This vast expanse of farmland—about 4.3 times larger than the amount in Japan—has long underpinned Thailand’s agriculture. Its mild tropical/subtropical climate makes it possible to cultivate crops throughout the year, and in the irrigable paddy fields that stretch across the central plain, rice is harvested more than once annually, with five crops in two years or three crops in a single year. Statistically speaking, however, farming (agriculture, forestry, and fisheries) as a percentage of GDP has been on a downward trend in relative terms: after recording 25.9% in 1970, the percentage has since dropped to 12.4% in 2016,* primarily due to the rapid development of the manufacturing and service industries. In 2011, the manufacturing industry accounted for approximately 34% of Thailand’s GDP and roughly 90% of its total exports.* Nevertheless, the country’s agricultural population still accounts for about 42% of the total, or 16 million people.* Grain self-sufficiency stands at 144%, which makes the country the leader in this category in Southeast Asia, and close to the top of the list globally. *7 It is true that these days Thailand often captures public attention as an industrial power, but much is expected from the further development of its agricultural business as farm mechanization continues to progress.

It was only in the 1960s that farming machines were first introduced to Thailand, and in those days, imported tillers accounted for most of the equipment available. They often broke down and there was little-to-no access to replacement parts, leading the Thai government to address the pressing need for domestic production of farm engines. At the time, Kubota was exporting general-purpose tillers to Thailand and offered maintenance services. Having high regard for Kubota’s impressive track record in the country, the Siam Cement Group (SCG), a conglomerate affiliated with Thailand’s royal family, chose Kubota as its partner to establish the joint venture Siam Kubota Diesel Co., Ltd. (SKDC) in 1978. SKDC started to manufacture and distribute farm diesel engines in 1980, and went on to expand the scope of its business to include the manufacturing and distribution of tillers, and, later, tractors and combine harvesters. With the merger of Siam Cement Group’s subsidiaries in 2010, the joint venture started afresh as Siam Kubota Corporation (SKC).

It is no exaggeration to say that Kubota’s history in Thailand has been defined by agricultural mechanization. The course of events changed in 2002, when the introduction of tractors and combine harvesters for paddy fields triggered an explosion in the market, boosting tractor sales there 40-fold between 2003 and 2008. Nevertheless, such machines were only being used by a small percentage of farmhouses. We visited Apichart Jongkul, Secretary General of Thailand’s Ministry of Agriculture and Cooperatives (MOAC) Office of Agricultural Economics, to ask what he thought was the essential issue for farming in Thailand.

“The lingering problem with farming in Thailand is that farmers’ income is unstable because the business is vulnerable to droughts, floods, and other natural phenomena,” he noted. “This puts many farmers in debt, and some are even forced to sell their land to repay the debt. As a relief measure, the Thai government established a land bank, through which the national government buys up land for leasing to individual farmers at an affordable rent.”

Apichart mentioned the shortage of labor in the farming sector as also a major bottleneck. “In order to develop the next generation of agricultural producers, we offer scholarships so that young people can gain skills in the field.” However, the fact is that young people are crowding into the big cities, with the result that the farming population is now dwindling. Because of this, we believe that it is essential to mechanize farming. Going forward, we may consider a scheme under which the government purchases farm machinery and offers it to individual farmers at reasonable costs.”

Thailand’s agricultural policies are characterized by the fact that they often lean toward protecting the producers. One policy that clearly exemplifies this is the “rice collateral loan system,” which basically amounts to a rice purchasing system under which the government purchases rice from producers at above market prices. However, this new scheme counteracted Thailand’s rice export (price) competitiveness, with the result that in 2012 the nation lost its position as the largest rice exporting country in the world—a ranking it had retained for as long as thirty years. *6 So, the question to be asked is, “Has Thailand come to a turning point?” Apichart claims that, “Agriculture remains the foundation of the Thai economy. Agriculture and the manufacturing industry are two sides of the same coin, and therefore we must protect agriculture. It is thus an important mission for the government to realize a living standard for farmers that they will feel content with.” The Thai government has a clear recognition that farming is not just another industry; it is an important asset for the country, and thus farmers engaged in the business must be protected. This perspective is the key to a better understanding of farming in Thailand.

*2009 data from MAFF web site
*4 Data by FAOSTAT from MAFF web site
*2011 data from Ministry of Foreign Affairs of Japan web site
*7 2009 data from MAFF web site
*8 2012 statistics announced by the Thai Rice Exporters Association (TREA), India and Vietnam placed first and second, respectively.

For the Benefit of Farmers—II
Localization Fully Established in Thailand— For the Benefit of Farmers—II


Apichart Jongkul
Secretary General, Office of Agricultural Economics, MOAC

Walk-behind tillers are a common sight at farmhouses. Not a few farmers own several of these tillers.
From “Manufacturing of Engines” to “Human Development.” Kubota’s Localization Accelerates.

To bring “happiness to farmers,” it is crucial to improve their standard of living by increasing their income. To make this happen, it is necessary for the farmers themselves to raise their own income by boosting yields and to maximise their profit margins by trimming production costs, before seeking support from the national government. This also requires that farm machinery, which has a significant influence on farmers’ earnings, and its manufacturers undergo a fundamental change, starting at the shop floor.

Kubota’s localization of manufacturing, which is now complete with the establishment of a local engine manufacturing plant, offers the potential for the company to reduce production costs and provide farmers with farm machinery at reasonable prices.

We visited Kubota’s production sites in Thailand to inquire about the present state and future prospects of their business and their empathy with farmers.

Some 125 km east of central Bangkok, an industrial park in Chachoengsao Province is the home of Kubota Engine (Thailand) Co., Ltd. (KET), which was established in February 2011 to perform parts processing and assembly of farm engines (mass production began in October 2012). The “hearts” of farm machinery, engines had until recently been imported from Japan. As demand continued to expand, however, Kubota decided to set up KET in a bid to further reduce costs. This completed the start-to-finish production process from cast manufacturing to parts processing and assembly of engines.

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“If we wish to further expand business in Thailand, we must definitely lower the prices of our engines,” says President Shigenori Kobayashi of KET. “Aside from enhancing cost competitiveness, one of the other objectives of establishing KET was to avoid forex risks. Since we have just begun mass production, our top priority now is to stabilize production at the earliest possible date, but we hope to standardize manufacturing processes like we did in Japan. This is because we believe that guaranteeing reliable product quality, in addition to lower costs, will lead to supporting farmers in Thailand.”

A founding member of KET who now supervises production, Kazunobu Nakata cites stable production and quality assurance as the two most important issues that they are currently tackling.

“Being a young company, most of the
engineers that we hired locally were new graduates," he notes. “It is thus imperative that we help them to develop through close communications so that we can stabilize production at the plant. At the same time, we are hoping to further lower costs by streamlining production and procuring materials more efficiently.”

In addition to engines for Kubota’s tractors and combine harvesters, KET is also charged with the mission of serving as a global supply center for external sales to construction equipment and industrial machinery manufacturers in Japan, the U.S., and emerging countries. As such, the company is in the heart of Kubota Thailand’s global strategy.

Standing close by KET is Siam Kubota Metal Technology Co., Ltd. (SKMT), Kubota’s first cast components manufacturing plant outside of Japan. Set up in December 2008 (mass production began in December 2010), SKMT manufacturers cast components for diesel engines.

Involving the molding of molten iron, casting production requires advanced expertise that cannot be quantified. Crankcases (engine blocks) are said to be difficult to produce in a stable manner due to their complicated shapes. With a view toward making greater inroads into the global market, however, Kubota finally decided to transfer its technology offshore. This posed a major challenge for Kubota, namely, training Thai operators on the production lines, which included improving their technological skills.

“To acquire skills, people must think for themselves and act voluntarily on their own initiative,” says President Isao Kuwahara of SKMT. “With this in mind, there is one habit that I want them to form, which is to enjoy what they are doing. If they learn the purpose of their jobs, they can become more knowledgeable, and eventually the entire plant will start changing for the better. Also, I hope that they will find the joy of working as they gain a sure sense that things are changing.”

Kuwahara says that he has an unshakable conviction that it is necessary in manufacturing “to make every decision by putting oneself in the customers’ shoes.”

More specifically, at the very basis of his plant management is a relentless pursuit to shorten lead-time, reduce costs, and improve quality for farmers.

“What we can and should do is provide machines that are affordable but do not easily break. To stabilize the global supply and demand of food, we must spread the use of machines among farmers. Our goal is to develop Thai operators who can take on this responsibility,” states Kuwahara. Manager Satoshi Tsuji of the SKMT Manufacturing Department agrees with Kuwahara on the importance of development and localization of not only products, but also human resources. “The primary objective of human resources development is to improve product quality by training operators on their skills; however, if we are to make a really significant contribution to the farming business in Thailand, I believe that localization in the truest sense of the word is a must. Now, what I mean by this is to see Thai employees take up key administrative roles at this plant, so there won’t be any overt feeling that this is a ‘Japanese company.’”

“KUBOTA Number 1 for Thai Agriculturists.” Charged with the Mission of Providing User Benefits

Manufacturing cast parts at SKMT involves pouring red-hot iron into a mold.
After leaving KET and SKMT, we made our way to the SKC Amata Nakorn Plant in Chonburi Province, some 60 km southeast of central Bangkok. Kubota’s largest production site in Thailand, SKC manufactures horizontal diesel engines and tillers at its Nura Nakorn Plant in Pathum Thani Province, 45 km north-northeast of central Bangkok, and produces tractors, combine harvesters, and rotaries (tractor attachments with rotating hoes for plowing land) at its Amata Nakorn Plant in Chonburi Province. The production function at the Amata Nakorn Plant is under the management of Thai employees, who naturally have more than the usual amount of feeling toward farming in Thailand.

“The important thing for accelerating the mechanization of farming in Thailand is to offer services that are finely tuned to the specific demands of farmers,” says Somchai Limthongsittikhun, a manager at SKC’s Combine Harvester & Rotary Manufacturing Division. “I am Thai myself, and also used to be a farmer, and so I understand how the farmers in Thailand feel. Different regions have various types of soil, and farmers use the same machines differently. I hope to make machines that reflect the spirit of the Thai people.”

“Agriculture is an all-too-important industry for Thailand. However, many of the farmers who support agriculture are mired in poverty,” notes Prasong Adulratananukul, a manager at SKC’s Tractor Manufacturing Division. “Farm labor is so hard that you begin wondering why on earth people would go to all that trouble. That is how difficult the reality is. Mechanizing farm labor is an effective way of breaking through this impasse. Toward this goal, we must definitely reduce production costs to lower our prices.”

What these two gentlemen have in common is a firm conviction that their involvement in the production of tractors and combine harvesters will help to support Thai farmers and contribute to the development of agriculture in Thailand.

The other key element of Kubota’s localization strategy in Thailand is Kubota Precision Machinery (Thailand) Co., Ltd. (KPMT), which began operation in July 2011. Responsible for production of hydraulic equipment, KPMT specifically produces cylinders for controlling tractor implements. Since such machinery tends to operate for longer hours in Thailand than in Japan, higher durability is required from the cylinders.

“I believe that our mission is to produce hydraulic equipment from the viewpoint of farmers, meaning failure-free, inexpensive equipment that performs stably. By pushing forward our localization strategy, we hope to increase our cost competitiveness, shorten lead-time, and supply service parts more efficiently, so that we can win the trust of users,” says President Toshihito Majima of KPMT.

At present, production is conducted at a temporary plant within the Amata Nakorn Industrial Estate, but production will commence in full swing in January 2014 at a new plant to be built within the Pinthong Industrial Estate in Chonburi Province. At this new plant, KPMT is planning to expand the line of components that they produce and supply globally both within and outside of the Kubota Group.

Procurement of components is one factor that affects production costs. Kubota had curbed its procurement costs by purchasing more from local suppliers, but in January 2013 it established Kubota Procurement & Trading (Thailand) Co., Ltd., which specializes in procurement and supply of components, in a bid to accelerate the global procurement setup under which components are acquired without a hitch from local suppliers in Thailand. At the same time, by centralizing procurement services that had previously been taken care of by each production site, hopes are high that tapping into the scale merit will result in greater bargaining power and increased efficiency in quality improvement activities.

Kubota has by now established a start-to-finish production process covering everything from cast manufacturing, parts processing, and assembly of engines to production of hydraulic equipment and assembly of farm machinery. There is no doubt that this newly reinforced cost competitiveness will further promote the mechanization of farming in Thailand and contribute to supporting farmers there. This entire series of initiatives by Kubota can be summarized into SKC’s message: “KUBOTA Number 1 for Thai Agriculturists.”

“For top priority on customer benefits, we constantly think about how we can contribute to farmers in Thailand. While providing a range of products that match customers’ purchasing power, we not only sell machinery, but also have assembled an R&D team to customize our machines to meet local needs and offer after-sale services when customers call on us. More recently, we have been working with our customers in the single planting area to start off-season cropping of soybeans, and teaching them how to raise seedlings and plant rice to increase productivity and yields. By offering practical solutions that maximize user benefits, Kubota sincerely hopes to move forward in step with our valued customers,” says President Hiroshi Kawakami of SKC.
Dao Pimpa
Group Leader, Machining Line, KET
“We produce high-quality yet inexpensive engines so that many farmers can make use of farm machinery.”

Tossawan Naudomsub
Assistant Manager, Administration & Account section, KPMT
“I am always thinking about what I can do for Thai farmers through this company.”

Ratchanok Wongcharoen
Assistant Manager, Kubota Ayutthaya (Hua Heng Lee)
“We will continue to catch customer demands and respond to them effectively.”

Somsak Niean-Aroon
Group Leader, Assembly Line, KET
“We will keep producing reliable engines that will last for a long time.”

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Nivath Jankaeng
Foreman, Combine Harvester Production Department, SKC
“I believe that supplying more combine harvesters will benefit farmers.”

Prasert Klinchantuek
Foreman, Combine Harvester Production Department, SKC
“We will continue to meet the expectations of farmers.”

Thongchai Sridee
Foreman, L Tractor Production Department, SKC
“I hope that farmers will put their trust in our sincere desire to produce quality products.”

Jirawat Pasaro
Foreman, Molding Line, SKMT
“Our goal is to achieve low-cost production.”

Krissana Chaosuan
Foreman, L Tractor Production Department, SKC
“I hope to ease the burden of farmers by making good products.”

Thaweechai Moonsawasde
Assistant Manager, Production Section, KPMT
“Just try using a Kubota machine. It will make work much easier.”

Watchara Kanmee
Foreman, Melting Line, SKMT
“I should like more farmers to learn what mechanization can do for farmers.”

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Having seen many of Kubota’s sites, we decided to pay a visit to dealers, who have daily contact with customers. Kubota now has as many as 80 dealers throughout the country, with an eye on further expansion of the network. Our first destination was Kubota Ayutthaya (Hua Heng Lee) Co., Ltd., a dealer covering the popular tourist destination of Ayutthaya Province in its entirety. It sells various types of farm machinery to some 1,000 farmhouses, and enjoys the lion’s share of the market at 90%.

Managing Director Wanchai Leenawatthana was born into a family that ran a Kubota dealer. After working for his parents’ business for a time, he became independent three years ago. He has since built up a management model for other Kubota dealers and developed a solid track record.

“Our management focus is threefold: to maximize customer satisfaction, meet customer demands, and fulfill our responsibilities to customers,” he states. “Our business is growing steadily, but I must say that Thai farmers are faced with no small number of problems. The most difficult one is unstable yields. We also have natural disasters and plagues of harmful insects. We believe that it is important for individual staff members to have a deep knowledge and understanding of farming.”

To promote sales of farm machinery, prospective customers are given a trial period as an opportunity to try machines out. By constantly improving the quality of after-sale care and maintenance, the dealership ensures that it will be able to cater to the diverse demands of customers.

“Generally, Thai farmers believe in mechanization,” Chalermchai Kittibuntorn, an assistant manager for SKC’s Central & Southern Division, explains. “But they consider the high prices of machines to be a bottleneck. Providing support for dealers’ marketing efforts, SKC’s salespersons feel the same way: ‘Every time I visit the fields, I am made to realize that many farmers are suffering from low income. Crop prices are on the rise, but many farmers find it difficult to make payments, as costs are also rising, with the result that the majority of farmers are running into debt. Mechanization of farming jobs is necessary to rectify this, but only a handful of farmers are affluent enough to afford machines. We are constantly monitoring what the farmers require and coming up with new options, such as provision of pre-owned machinery and financing by agricultural banks,” says Chalermchai Kittibuntorn, an assistant manager for SKC’s Central & Southern Division.

**Affluent Lifestyle Brought About by Mechanization.**

**High Expectations for Affordable Lines in the Growth Market**
GLOBAL INDEX

For the Benefit of Farmers—II

Localization Fully Established in Thailand

Somkhit Harweetee of Savandid Village in Ayutthaya Province has been engaged in rice production for nearly 40 years. He took his first step toward mechanization when he purchased a tiller some 20 years ago, and purchased another then-current model after 10 years. Also, he purchased a tractor five years ago, which he subsequently replaced with a higher-horsepower model two years ago.

“I once used other brands, but I found Kubota machines the easiest to use, and you could even say that I feel a great sense of affection for my Kubota machines,” says Somkhit. “Looking back on the mechanization of my work so far, I remember that the introduction of tractors had a particularly large impact. It certainly made my work easier. I remember Somyot Onramuern, who is a long-time user of Kubota’s machines, say that Kubota is like a lifetime partner.”

“Higher earnings through lower labor costs led to improved standards of living for the farmer. He rebuilt his house, purchased paddy fields, and saw his saving accounts growing. To purchase the tractors, Somkhit took advantage of a leasing plan where he paid 60% of the cost out of his own pocket and Kubota covered the rest.

Tamgonsak Sarwin of Ban Mai Village in the same province grows rice with his son Sompop. He is a longtime user of Kubota’s pre-owned tractor, but recently purchased a new one completely at his own expense. Like Somkhit, Tamgonsak says that tractors can save them significant expenses.

“Just like their counterparts in Japan, farmers in Thailand often lack successors, but the Tamgonsak family does not seem to share this problem: their 20-year-old son quit his job at a factory and returned to the village. “One of the beautiful things about being a farmer is that you have lots of freedom. I’d like to assist my father to boost our income so that we can improve our livelihood,” says the dutiful son.

When we visited Kubota’s plants for this report, we listened to what employees on the shop floor had to say and found that, like Sompop, most of them were from farming families. They said that they send money to their parents’ homes and taking over their family businesses. In Thailand, family ties are what underpin agriculture. The existence of young people who are ready and willing to succeed on the farm is a ray of hope for the farming industry in Thailand, and mechanization is definitely playing a leading role in this.

So long as the hurdle of initial investment is cleared, introducing farm machines will surely boost farmers’ income. As many farmers still lead modest lives, the penetration of tractors is not very high. Conversely, the market has yet to mature and there still exists much room for sales expansion.89 Anticipation is growing that Kubota will be able to establish a completely localized production process to provide inexpensive farm machines.

* The main customer group for combine harvesters is the contract business of “harvesting services,” which harvest crops for a fee. Combine harvesters have yet to penetrate the level of the individual farmer, but are often purchased collectively by the village community.
For many years, Kubota has endeavored to reduce costs for farmers by locally producing farm machinery. Beyond that, however, the company has made greater efforts to promote “true localization.” Beginning with the manufacture of farm diesel engines and tillers, this age-old initiative has resulted in a start-to-finish production process from engines to finished products, with some 90% of components procured from within Thailand. With this development, the drive to localize manufacturing has virtually come to fruition.

These consistent efforts by Kubota in Thailand have borne fruit in what might be called the “Thai model.” Farming in the country will surely make progress as the model broadens and deepens; however, this is not exclusive to Thailand. As SKC President Kawakami proclaims, “Thailand will be Kubota’s regional production center in Southeast Asia and a ‘second mother plant,’ from which Kubota will accelerate its development into neighboring countries.” His plan is to expand sales networks in Laos, Cambodia, and Myanmar, and promote sales in the Philippines, Indonesia, Vietnam, and India.

For Kubota, “true localization” means to be completely assimilated within the host community. For this to happen, Kubota believes that these operations must be for Thai people and by Thai people, i.e., managed by Thai employees. It is in line with this policy that the importance of human resource development has been emphasized at each subsidiary.

“Wherever we go, our mission of pursing user benefits does not change,” notes Kawakami. “This means that we are required to offer machines and solutions that are customized to the specific demands of each region. For us to meet these requirements, we must focus on the development of our people so that we can keep pace with rapid market growth. This is why we believe that it is important to ‘make people before making products.’”

Whether it is greater localization in Thailand or expansion to neighboring countries, “people” are the ones thinking and acting “for farmers” in each locality. “We want our people to find in their work something that they can put their hearts and souls into—something that they can live for. It is when people realize such fulfillment that they truly grow,” says Kawakami. It is the awareness of each and every Kubota employee that makes it possible to make changes in production and selling sites and provide farmers with substantial benefits. Bringing this “Thai model” of manufacturing and human resource development to other parts of the world will eventually contribute to progress in agriculture in each region, and may become a key to resolving the world’s food problem. When this becomes a reality, SKC’s message of “KUBOTA Number 1 for Thai Agriculturists” will be transformed into “KUBOTA Number 1 for World Agriculturists.” For the “farmers of the world,” Kubota’s challenge is entering into a new phase.