Motorcycle Industry

COMPETITIVENESS ROADMAP

“PUTTING THE NATION ON MOTORIZED TWO-WHEELS”

MDPPA
Outline of Presentation

- Development of the Philippine Automotive Industry
- Global Motorcycle Industry
- Philippine Motorcycle Industry Backgrounder
- Domestic Motorcycle Industry
  - Motorcycle Manufacturing Linkages
  - Factors that Motivate Growth
  - Factors that Dampen Growth
- SWOT / TOWS Analysis
- Strategic Action for Growth
The beginnings of the auto industry can be traced back to the commercial importation of CBU cars and trucks from 1916 to 1950.
Development of the Philippine Auto Industry

Progressive Motor Vehicle Manufacturing Program (1972)

- Local Content Requirement
- Foreign Exchange Requirement
- Prohibition of vehicle importation

MVDP
(MO136 / Dec. 1, 1987) CDP
(MO 57 / Feb. 9, 1988) CVDP
(MO160 / Feb. 29, 1988 ) MDP

Amended MVDP
(MO346 / Feb. 26, 1996)

- Termination of Local Content and FOREX Requirements based on GATT-WTO TRIMS
- Import liberalization of brand new CBU

New MVDP (EO156)
(Dec. 12, 2002)

- Phase-out of Local Content and FOREX requirements under the TRIMS Extension
- Prohibition of used vehicle importation
Global Motorcycle Production

Philippines rank 8th in world’s motorcycle production overtaking Japan and 4th in ASEAN surpassing Malaysia
ASEAN 4 Production 2007 - 2012

<table>
<thead>
<tr>
<th>Year</th>
<th>Indonesia</th>
<th>Malaysia</th>
<th>Philippines</th>
<th>Thailand</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>4,722,521</td>
<td>446,415</td>
<td>671,588</td>
<td>1,646,873</td>
</tr>
<tr>
<td>2008</td>
<td>6,264,265</td>
<td>536,567</td>
<td>734,666</td>
<td>1,907,424</td>
</tr>
<tr>
<td>2009</td>
<td>5,884,021</td>
<td>436,430</td>
<td>756,228</td>
<td>1,634,113</td>
</tr>
<tr>
<td>2010</td>
<td>7,395,390</td>
<td>467,941</td>
<td>903,722</td>
<td>2,024,599</td>
</tr>
<tr>
<td>2011</td>
<td>8,006,293</td>
<td>498,076</td>
<td>1,052,566</td>
<td>2,043,039</td>
</tr>
<tr>
<td>2012</td>
<td>7,079,991</td>
<td>543,088</td>
<td>1,045,915</td>
<td>2,606,161</td>
</tr>
</tbody>
</table>

Source: FAMI
### Philippine Motor Vehicle Registration

<table>
<thead>
<tr>
<th>Year</th>
<th>TOTAL MV</th>
<th>TOTAL MC</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>5,530,052</td>
<td>2,647,574</td>
</tr>
<tr>
<td>2008</td>
<td>5,891,272</td>
<td>2,982,511</td>
</tr>
<tr>
<td>2009</td>
<td>6,220,433</td>
<td>3,200,968</td>
</tr>
<tr>
<td>2010</td>
<td>6,643,627</td>
<td>3,500,729</td>
</tr>
<tr>
<td>2011</td>
<td>7,136,986</td>
<td>3,760,893</td>
</tr>
<tr>
<td>2012</td>
<td>7,311,572</td>
<td>4,120,315</td>
</tr>
</tbody>
</table>

### Source: LTO
## Historical Domestic Industry Sales

### LTO New Registrations
- 2003: 343,138
- 2004: 495,400
- 2005: 585,482
- 2006: 605,038
- 2007: 671,588
- 2008: 734,666
- 2009: 756,228
- 2010: 903,663
- 2011: 1,014,1
- 2012: 1,048,2

### MDPPA Sales
- 2003: 257,401
- 2004: 409,704
- 2005: 492,883
- 2006: 517,702
- 2007: 549,106
- 2008: 594,989
- 2009: 637,792
- 2010: 753,111
- 2011: 731,095
- 2012: 702,597

### Industry % Growth
- 2003-2004: 44.4%
- 2004-2005: 18.2%
- 2005-2006: 3.3%
- 2006-2007: 11.0%
- 2007-2008: 9.4%
- 2008-2009: 2.9%
- 2009-2010: 19.5%
- 2010-2011: 12.2%
- 2011-2012: 3.4%

### MDPPA % Share
- 2003: 75.0%
- 2004: 82.7%
- 2005: 84.2%
- 2006: 85.6%
- 2007: 81.8%
- 2008: 81.0%
- 2009: 84.3%
- 2010: 83.3%
- 2011: 72.1%
- 2012: 67.0%
Economic and Social Contributions

- Compliant to the conditions of the MVDP
  - Minimum investment of US$2M. As of 2011, investments of member companies have reached PhP 3.4B in Paid Up Capital and PhP 6.8B in PPE
  - Conveyorized assembly line with painting, welding and testing operation for mass production. Over 95% of sales are assembled CKD parts and components
  - Parts Manufacturing
  - PDP for local parts. Localization rate (amount based) of member companies is approximately 15%
  - After sales services. Establishment of 600 3S shops and support to phased out models
- Direct employment of 5,000+ personnel. In addition are employment generated by several support groups (e.g., dealers, suppliers, service providers) estimated at 30,000
- Contribution to revenue generation (taxes and duties) in 2012 at PhP 2.2 billion
- Contribution to GDP at 0.7%
- Consumer Protection
  - Warranty
  - Standards compliance on products and environment
- Deference to Intellectual Property Rights
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- **SWOT / TOWS Analysis**
- **Strategic Action for Growth**
Motorcycle Supply/Value Chain

- **Universities/Training Institutions/Research Centers**
- **Industry Associations/Chambers**

- **Raw Material Supplier**
  - **1st Tier**
  - **2nd Tier**
  - **OEM**

- **Core activities**
- **Supporting industries**

- **Foreign/Domestic Suppliers**
- **Logistics/Shipping Firms**

- **Technology/Equipment Suppliers**
- **Professional/Manufacturing/Financial Services**

- **Logistics/Shipping Firms**
- **Dealers**
- **Marketing Arms**

- **ASEAN Market**
- **Domestic Market**
- **After market**
- **Other Markets**

- **Tiers**: MNCs, Large firms
- **Tier 2**: SMEs
Motorcycle Manufacturing Industry Linkages

Iron & Steel Industry
- Foundry
- Forging
- Metal casting
- Tool & Die

Rubber Sector
- Injection
- Molding

Petrochem Industry
- Injection/Molding
- Vacuum Forming

Electrical Industry

Others
- Automotive Metal Parts Producers
- Automotive Rubber Parts Producers
- Automotive Plastic Parts Producers
- Automotive Electrical Producers
- Chemical and Allied Autoparts Producers

Consumers

Dealers/Distributors

Manufacturers

A fully-integrated automotive industry that will impact allied industries.
Parts Utilization vs Sales

- Value of Parts Purchased
  - 2006: 2,969,774,839
  - 2007: 3,355,845,629
  - 2008: 3,684,798,610
  - 2009: 4,519,629,628
  - 2010: 5,931,076,826
  - 2011: 5,945,328,345

- Sales
  - 2006: 517,705.00
  - 2007: 553,143.00
  - 2008: 594,989.00
  - 2009: 637,792.00
  - 2010: 753,111.00
  - 2011: 731,130.00

No. of Suppliers
- 2006: 70
- 2007: 71
- 2008: 84
- 2009: 118
- 2010: 123
- 2011: 128
## Summary of ASEAN Fiscal Incentives

<table>
<thead>
<tr>
<th></th>
<th>The Philippines</th>
<th>Indonesia</th>
<th>Malaysia</th>
<th>Thailand</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CIT Rate</strong></td>
<td>30 percent</td>
<td>30 percent</td>
<td>28 percent</td>
<td>30 percent</td>
</tr>
<tr>
<td><strong>Tax Holidays and Reductions</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Up to 8 year income tax holidays for newly registered pioneer projects meeting certain conditions.</td>
<td>3 to 8 year income tax holiday for new pioneer enterprises in 22 specific sectors.</td>
<td>5 year tax holiday on 70 to 100 percent statutory income (or 10 year holiday for companies of national and strategic importance).</td>
<td>Corporate income tax holidays up to 8 years followed by a further 5 year holiday on 50 percent of corporate income tax (for priority activities and companies in certain geographical areas).</td>
</tr>
<tr>
<td></td>
<td>3-6 year income tax holidays for non-pioneer projects, expansion projects, and for locating in less developed regions.</td>
<td>Halving of income tax withholding on dividends to non residents for companies in economic development zones or in priority sectors.</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Tax allowances and credits</strong></td>
<td>Various tax credits on domestic breeding stocks and genetic materials, as well as for incremental export revenue</td>
<td>Doubling of depreciation rates for companies in economic development zones or investing in priority sectors</td>
<td>Investment allowances for 60 to 100 percent of qualifying capital expenditure.</td>
<td>Investment allowance of 25 percent for expenditures on infrastructure.</td>
</tr>
</tbody>
</table>
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<tr>
<td><strong>Import Duty and VAT Exemptions</strong></td>
<td></td>
<td></td>
<td>Various import duty reductions for projects located in certain regions.</td>
</tr>
<tr>
<td>Exemptions from taxes and duties on imported supplies and spare parts.</td>
<td>• Capital goods are duty and VAT exempt.</td>
<td>• Duty-free import of raw material and spare parts for re-export.</td>
<td></td>
</tr>
<tr>
<td>Zero duty on importation of capital equipment (EO 70 s 2012)</td>
<td>• Reduction of import duty on machinery, spare parts, and raw materials.</td>
<td>• Import duty and sales tax exemption on machinery and equipment that cannot be produced locally.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Special duty drawback and VAT exemption for companies with export ratio over 65 percent.</td>
<td>• Sales tax and excise exemption on locally purchased machinery and equipment</td>
<td></td>
</tr>
<tr>
<td><strong>Others</strong></td>
<td>Loss carry-forward extended to 10 years for companies in companies in economic development zones or in priority sectors.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional 50 percent deduction for labor expenses for 5 years for new projects above certain ratio of capital equipment to workers.</td>
<td></td>
<td>• Double deduction of various expenses (such as R&amp;D and training).</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Reduced tax rate of 3 percent for offshore companies in Labuan.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Dividend distributions during holidays are from income tax exempt.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Double deduction for utility and transportation costs in certain regions.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Dividend distributions during holidays are tax exempt.</td>
<td></td>
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</table>
2012 Motorcycle Density

Motorcycle taxis – also known in Mindanao as “skylab” and “habal-habal”

Untapped domestic market presents a healthy picture for the industry. Even after saturation, Filipinos will continue to use motorcycles in various travel needs and livelihood.

Philippines (2012) – 24:1

Indonesia – 4:1  Malaysia – 4:1  Thailand – 4:1  Vietnam – 8:1
Drivers of Growth

Industry
- Rising per Capita GDP
- Increasing urbanization & migration
- Inadequate public transport
- Access to Favorable credit terms
- Government incentives

Assemblers
- Directions of principal brand owners
- Population & possession ratio
- Favorable demographics
- Opportunity for brand marketing
Influence of Supply-side Factors

- **Installed Capacity**: Assembly operation sufficient to sustain growth
- **Entry of New Players**: New products with new features provide wider choices for consumers
- **Promotion and distribution reach**: Growing 3S shops and sales network in rural areas
- **Consumer Finance**: Banks and other financial institutions now offer financing schemes

- Expansion plans postponed due to surge in cheap imports
- IPR infringements and lack of after-sales support
- Warranty issues for non-compliant products
- Growing repossession rate and delinquent accounts
Dampeners of Growth

- Redundant government processes
- Under-developed local parts sector
- Road Safety Issues
- Technical Smuggling
- Unabated IPR violations
- High production costs
Under-developed local parts sector

Road Safety Issues

Technical Smuggling

High production costs

Unabated IPR violations

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- Underdeveloped local parts sector
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- Redundant government processes
- Increased product piracy

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- Technical Smuggling
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- Unabated IPR violations
Factors that Motivate Growth

For developing countries, threshold where general preference of people gradually start to shift to 4W is at 3000USD. Based on forecast, the Philippines is not expected to hit this level until 2019.
### Industry Growth Forecast 2013-2015

<table>
<thead>
<tr>
<th>Year</th>
<th>LTO (Units)</th>
<th>% GR</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>756,228</td>
<td>19%</td>
</tr>
<tr>
<td>2010</td>
<td>903,663</td>
<td>12%</td>
</tr>
<tr>
<td>2011</td>
<td>1,014,104</td>
<td>3%</td>
</tr>
<tr>
<td>2012</td>
<td>1,048,228</td>
<td>8%</td>
</tr>
<tr>
<td>2013</td>
<td>1,132,086</td>
<td>10%</td>
</tr>
<tr>
<td>2014</td>
<td>1,245,295</td>
<td>10%</td>
</tr>
<tr>
<td>2015</td>
<td>1,369,824</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>756,228</td>
</tr>
</tbody>
</table>

**Note:** The graph shows a marked increase in units sold from 2009 to 2015, with a slight dip in 2011. The growth rate (GR) varies annually, with the highest increase seen in 2011.
## Industry SWOT / TOWS Analysis

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Recognized as alternative mode of transport</td>
<td>• Lesser attention given to the industry (involvement in policy formulation)</td>
</tr>
<tr>
<td>• MVDP Participants</td>
<td>• Underdeveloped local parts manufacturing sector</td>
</tr>
<tr>
<td>• Association of established manufacturers</td>
<td>• Lack of raw materials local manufacturers</td>
</tr>
<tr>
<td>• Strong dealer network</td>
<td>• Lack of testing facilities</td>
</tr>
<tr>
<td>• Low barrier for entry of new players</td>
<td>• Inadequacy/inaccessibility of industry data i.e. importation, production, registered mc per area, accident per causes</td>
</tr>
<tr>
<td>• Common models marketed among ASEAN members</td>
<td>• Weak enforcement of government regulations</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Continuing increase in demand</td>
</tr>
<tr>
<td>• Development of supporting industry i.e., die making, precision machining</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Proliferation of copycat motorcycles and fake parts and components</td>
</tr>
<tr>
<td>• Road safety issues affecting MC sales (incorrect implementation of MC lanes, road infrastructures posing risks to MC)</td>
</tr>
<tr>
<td>• Complex government procedures i.e., importation, registration</td>
</tr>
<tr>
<td>• Inconsistency of ordinances/regulations (local vs national)</td>
</tr>
<tr>
<td>• Weak enforcement of government regulations</td>
</tr>
</tbody>
</table>
## Industry SWOT / TOWS Analysis

### SWOT

#### MDPPA ROADMAP

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<thead>
<tr>
<th><strong>STRENGTHS</strong></th>
<th><strong>WEAKNESSES</strong></th>
</tr>
</thead>
</table>
| • Recognized as alternative mode of transport  
• MVDP Participants  
• Association of established manufacturers  
• Strong dealer network  
• Low barrier for entry of new players  
• Common models marketed among ASEAN members | • Lesser attention given to the industry (involvement in policy formulation)  
• Underdeveloped local parts manufacturing sector  
• Lack of raw materials local manufacturers  
• Lack of testing facilities  
• Inadequacy/inaccessibility of industry data i.e. importation, production, registered mc per area, accident per causes  
• Weak enforcement of government regulations |

### OPPORTUNITIES

- Continuing increase in demand  
- Development of supporting industry i.e., die making, precision machining

### WEAKNESSES

### O-S Strategies

- Further strengthening of the program for a new MVDP responsive to current industry requirements  
- Focus on the development of he supporting industry;  
- Develop local parts manufacturing sector (both in-house and outsourced)

### O-W Strategies

- Motorcycle sector to be well-represented in a contemplated Automotive Industry Council  
- Strengthen local support industries through provision of suitable and easy-to-implement incentives scheme  
- Encourage assemblers to localize engine and engine parts manufacturing as backbone of the industry development

### THREAT

- Proliferation of copycat motorcycles and fake parts and components  
- Road safety issues affecting MC sales (incorrect implementation of MC lanes, road infrastructures posing risks to MC)  
- Complex government procedures i.e., importation, registration  
- Inconsistency of ordinances/regulations (local vs national)  
- Weak enforcement of government regulations

### S-T Strategies

- Road Safety Advocacies/ Proper consultations and representation in public fora and policy-making bodies to protect the welfare of MC sectors  
- Execution of MOAs with implementing agencies i.e., NCIPR members  
- Quality products - DTI to mobilize team to strictly implement safety standards  
- Streamline processes:  
  a) **administrative** - reorganize departments involved in motor vehicle transactions  
  b) **technology-based systems** - implement effective seamless on-line processing from importation to registration  
  c) **legislation** - may needed law to support changes in policies  
- Establish a Road Safety Board within DOTC where all policies on road safety both national and local shall emanate

### T-W Strategies

- All-out campaign with the support of media and private sector to address the following:  
  1. IPR issues  
  2. MC policies (safety, standards, trade and environment)  
  3. Streamlining of government processes (anti-red tape)  
- Provide access to industry data data i.e. importation, production, registered mc per area, accident per causes
## Strategic Action for Growth

<table>
<thead>
<tr>
<th>ACTION PLAN</th>
<th>MEASURES</th>
</tr>
</thead>
</table>
| Ensure Fair Market Play in the MC Industry | • **Strict monitoring of participants’ compliance to MVDP commitments**  
  o Compliance with the $2M investment and assembly facility requirements  
  o Parts and components manufacturing  
  o Monthly/Quarterly reportorial requirements  
  • **Strict enforcement of IP Laws**  
    • Registration of products (trademark, patent) with IPO prior to BOI registration of models  
    • Reference of models for registration to Japan Patent Office and China Patent and trademark Office by BOI through the FTCS/Foreign Trade Posts  
    • Speedy disposition of IP cases  
    • Strict border control procedures in coordination with OEM i.e. technical smuggling and IP infringement |
## Strategic Action for Growth

<table>
<thead>
<tr>
<th>ACTION PLAN</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Develop parts manufacturing industry</td>
<td>• Incentivize</td>
</tr>
<tr>
<td></td>
<td>o Exemption from import duties of raw materials for parts and components production`</td>
</tr>
<tr>
<td>Compliance to ASEAN MRA</td>
<td>• Harmonization of technical standards</td>
</tr>
<tr>
<td></td>
<td>5 ECE</td>
</tr>
<tr>
<td></td>
<td>o R39 – Speed Meter</td>
</tr>
<tr>
<td></td>
<td>o R40 – Exhaust Emission (Euro 3)</td>
</tr>
<tr>
<td></td>
<td>o R41 – Noise</td>
</tr>
<tr>
<td></td>
<td>o R75 – Tires</td>
</tr>
<tr>
<td></td>
<td>o R60 – Control and Tell Tales</td>
</tr>
<tr>
<td></td>
<td>• Upgrade testing facility capability</td>
</tr>
<tr>
<td></td>
<td>o R39</td>
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<td></td>
<td>o R 40</td>
</tr>
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<td></td>
<td>o R 41</td>
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### Strategic Action for Growth

<table>
<thead>
<tr>
<th>ACTION PLAN</th>
<th>MEASURES</th>
</tr>
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<tbody>
<tr>
<td>Push for simplification of government procedures</td>
<td>• Interconnectivity of concerned government agencies systems</td>
</tr>
<tr>
<td></td>
<td>o Online MC Registration</td>
</tr>
<tr>
<td></td>
<td>o Remove CSR and PNP Clearance Requirements</td>
</tr>
<tr>
<td>Heap on RS Promotion</td>
<td>• Efficient implementation of road infrastructures posing risks to MC</td>
</tr>
<tr>
<td></td>
<td>o Designation of at least 2 non-exclusive lanes for MC IN EDSA and Commonwealth Avenue</td>
</tr>
<tr>
<td></td>
<td>o Establishment of MC Rain Shelters</td>
</tr>
<tr>
<td></td>
<td>o Strict implementation of Helmet/Headlights On law, rules and regulations</td>
</tr>
</tbody>
</table>
“PUTTING THE NATION ON MOTORIZED TWO-WHEELS”

Motorcycle Development Program Participants Association, Inc.
www.mdppa-inc.org
sec.gen@mdppa-inc.org

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